User Manual

Patient Scheduling - Foundational

Part #1

Version Control

Revision History

Version	Date	Summary of Changes	Author (Last, First Name)
1.0	2017-12-15	First draft	Mohsin, Rubana Eligh, Heather
2.0	2018-02-02	Second draft	Mohsin, Rubana Eligh, Heather Parmar, Anup
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Overview

This reference manual is designed to supplement a hands-on, instructor led session. In order to show general information placement, pictures of various screens have been included. Please note that these are standard screens and may not match exactly to those at your site.

Learning Objectives

At the end of this session, class participants will be able to:

- Navigate the Scheduling application
- Run Inquiries on Patient, Resource and Location schedules
- Schedule single, multiple and group appointments
    - Use the three different methods (Drag & Drop, Suggest and Schedule) to schedule appointments
- Cancel and reschedule appointments
- Shuffle appointments
- Schedule recurring appointments
- Check-in appointments
- View appointment details and history
- Manage Request List
- Use Work Queue Monitor (WQM)
- Manage Referral Triage for a clinic
- Use Multi-Patient Task List (MPTL)

Course Audience

The target audience for this course is patient scheduling staff at Lions Gate Hospital and Squamish General Hospital.

Prerequisites

Registration for Inpatients and Outpatients are pre-requisites for taking the Scheduling course as Enterprise Master Patient Index (EMPI) search is only covered in this course only.

All participants are expected to be competent in the following areas:

- Computer basics
- Microsoft Windows

Getting Started

Logging In

Double-click on the **SchApptBook** icon  to open the application.

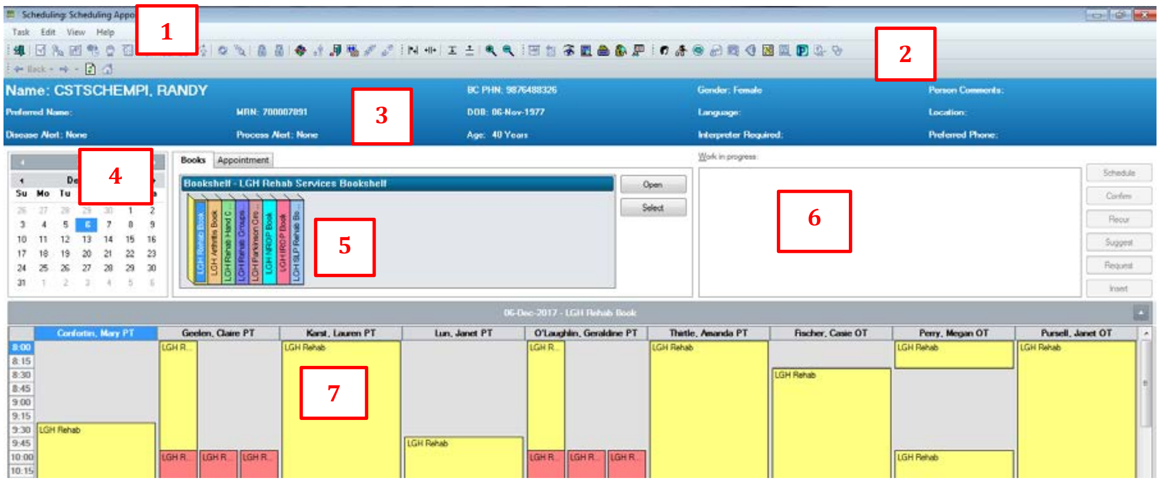
Logging Out

When you have completed your activities, remember to log out of the application you are working on for security purposes. Logging out can be done in one of the following two ways:

1. From the Toolbar, you may select the **Exit** icon (recommended to avoid locking the patient record). 
2. You may also click the  in the upper right hand corner of your screen.

Overview of SchApptBook Interface

When you log-in to the Scheduling Appointment Book application, the Scheduling Appointment Book window displays.



1. **Menu Bar**: Includes Task, Edit, View and Help options.
2. **Toolbar**: Includes buttons or other window elements (such as Person Management, Request List Inquiry, Modify, Cancel, Reschedule, Print, Shuffle, Create Group Session, Swap Resources, and Exit) to facilitate accomplishing a task.
3. **Demographics Bar**: Displays Patient's Name, Age, Date of Birth, Gender and MRN.
4. **Calendar**: Assists in booking appointments by the days, weeks and months of a particular year.
5. **Bookshelf:** Contains the Scheduling Appointment Books that are used to schedule and manage appointments.
6. **Work in Progress (WIP):** An area where a partially completed appointment resides until you are ready to book and confirm it.
7. **Scheduling Grid**: Contains Resource (person, equipment, room/place) schedules. This is where appointments are scheduled and managed.

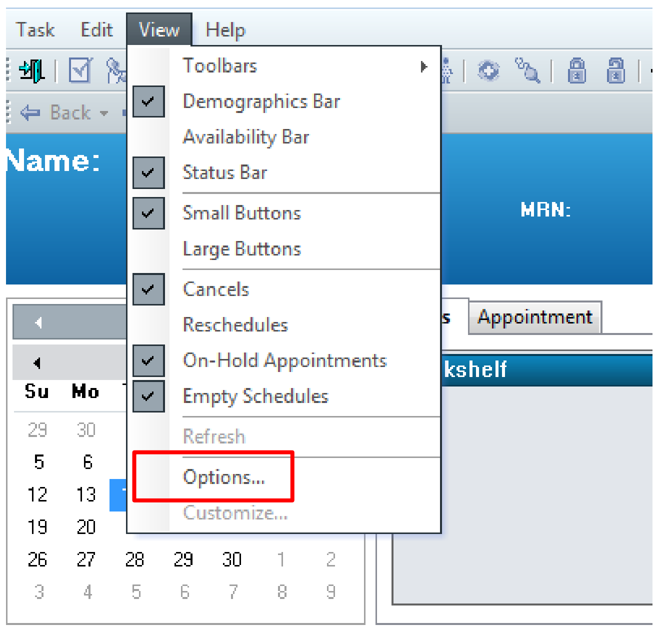
User Preference Setup

Within the Scheduling Appointment Book application, there are several options which are set at the user level. These options will already be applied to the user accounts. Once these preferences are applied, the information will not be needed to be entered /changed again unless different preferences are required.

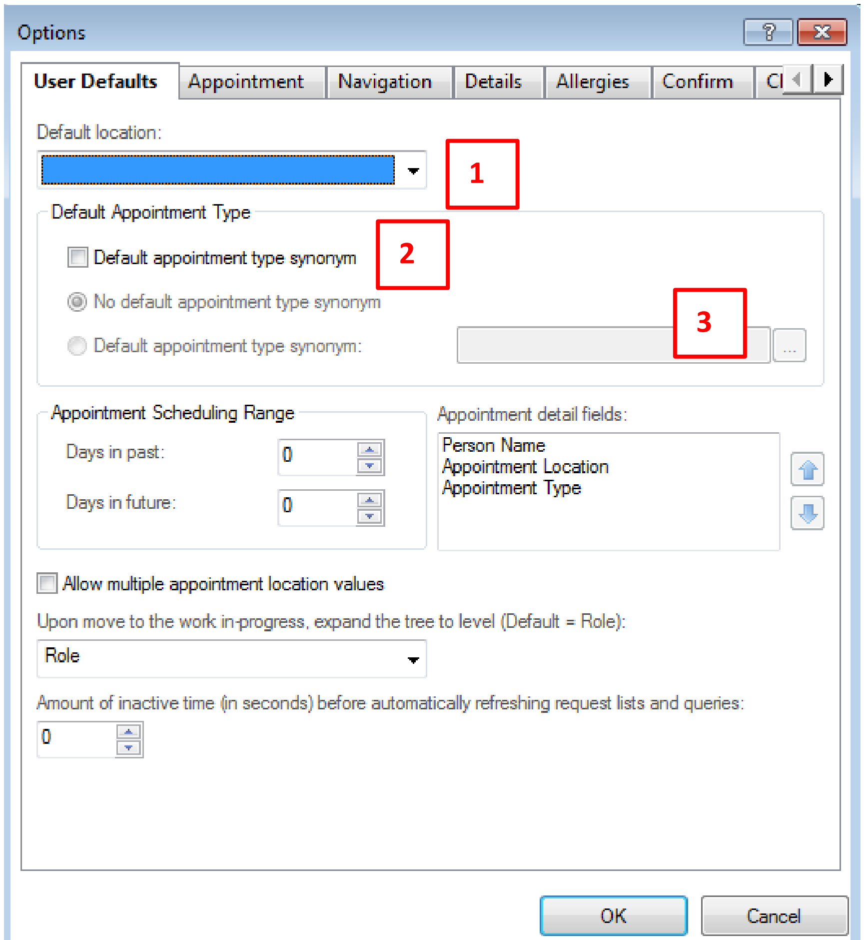
Refer to the "Scheduling User Preferences Quick Reference Guide" for more details about all of the Scheduling Preferences. The sub-sections below will cover the "Preference" options that are most likely to be modified by the users.

Setting Default Location/Book

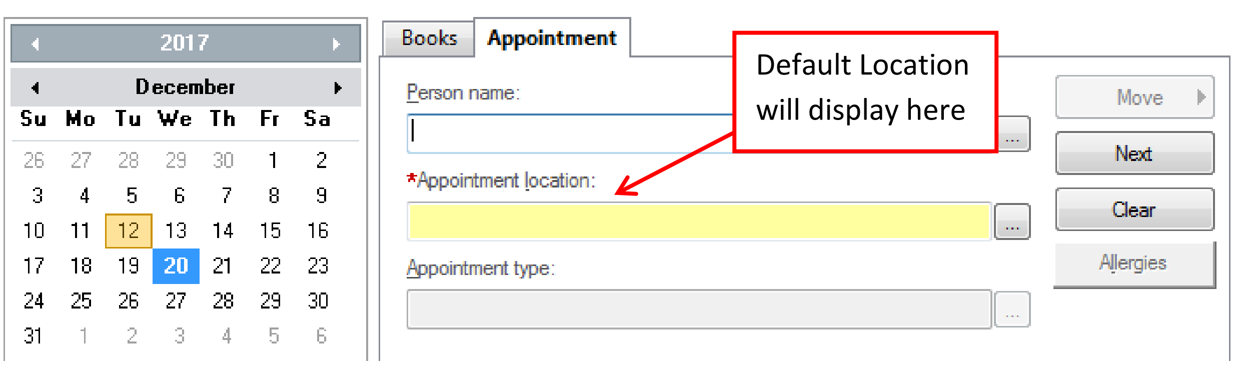
1. Click **View** in the Toolbar and select "Options."



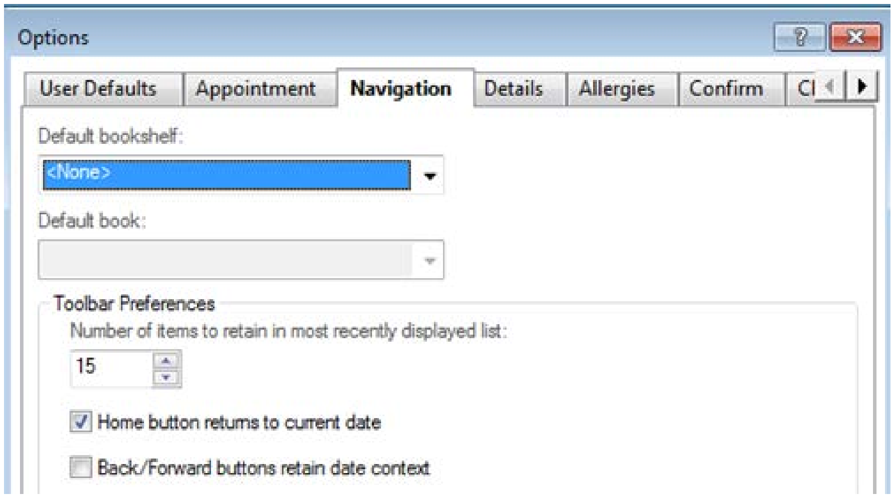
2. This will open the "Options" window which has a number of tabs. **User Defaults** is the first tab and it allows you to set a default location (refer to screenshot below). The location entered in this field will always appear in the **Appointment Location** field when scheduling an appointment. It is only appropriate to enter a default location if you schedule appointments for one location.



1. **Default Location** can be chosen from the drop down menu. This function would be used if a user schedules consistently for one location, i.e. the LGH RAN Clinic.
2. **Default Appointment Type Synonym** can be chosen by selecting the radio button
3. **Appointment Synonym** can be selected from searching in the box for the desired appointment type. This option could be used if a user consistently schedules one appointment type. The appointment type selected will automatically defaults into the appointment type field.



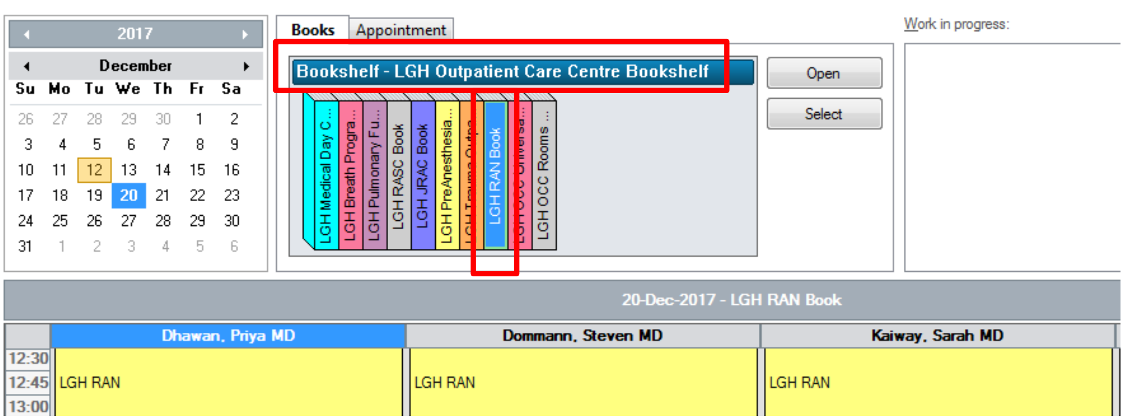
4. Click on the **Navigation Tab**. This is where you can set a default Bookshelf and Book.



Default Bookshelf: Enter the name of the **Bookshelf** that you would like to open when you log into the SchApptBook application. There is a list available to assist you in selecting a predefined bookshelf.

Default Book: Enter the name of the **Book** that you would like to open when you log into the SchApptBook application. There is a list available to assist you in selecting a predefined book.

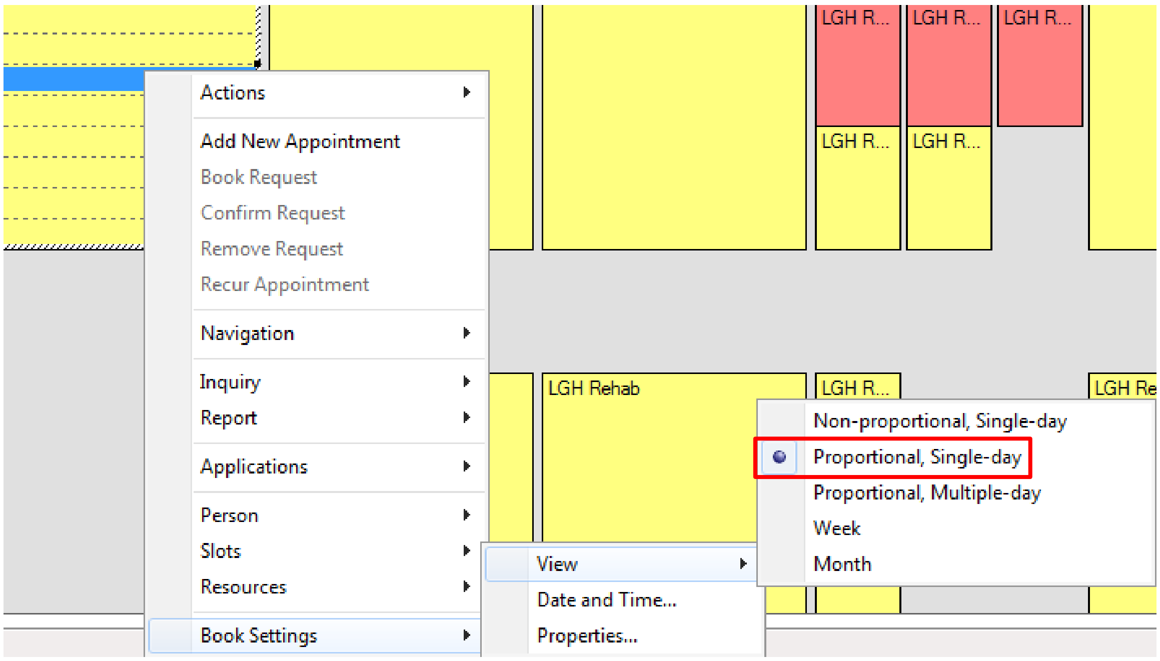
In the example below, the default Bookshelf is the "**LGH Outpatient Care Centre Bookshelf**" and the default Book is the "**LGH RAN Book.**"



Book Settings

Book settings determine the view of the appointment book. These can be accessed by right-clicking in the scheduling grid and selecting "**Book Settings**."

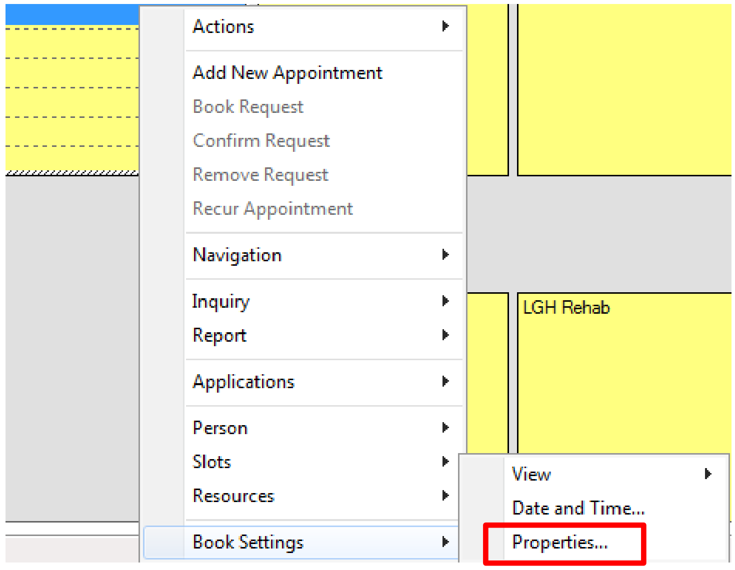
View



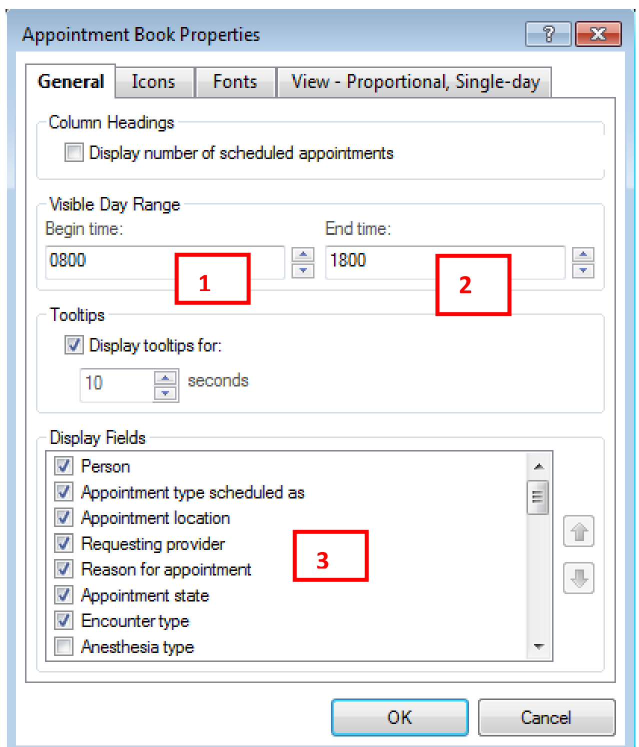
Proportional, Single-day View: This is the default and recommended view that allows the user to see all of the breaks in the day. The times are at the left-hand side of the book.

Appointment Book Properties

Appointment book properties include settings such as the Begin and End time of the scheduling grid, the data that displays in a scheduled appointment and the time interval of the scheduling grid. Appointment book properties can be accessed by right-clicking on the scheduling grid, selecting "**Book Settings**" then selecting "**Properties.**"



General Tab



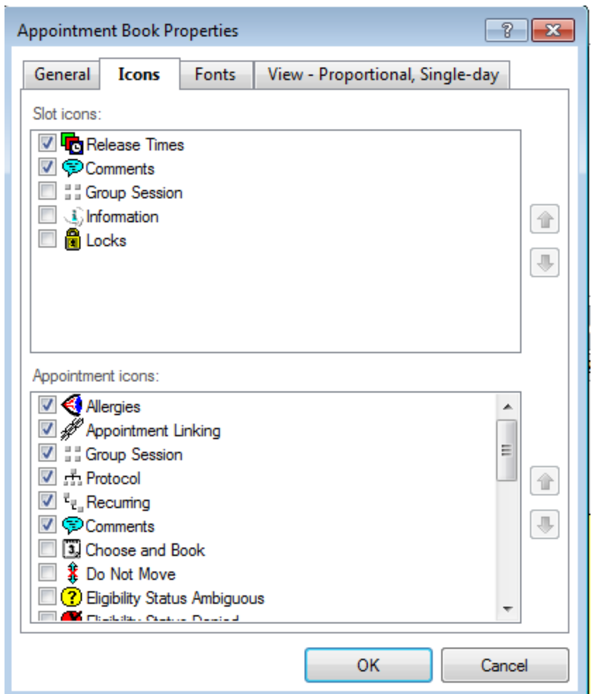
1. **Begin Time**: In military time, this determines the time that the appointment book will start; this crosses all books and bookshelves.
2. **End Time**: In military time, this determines the time that the appointment book will end; this crosses all books and bookshelves

NOTE: If there are any slots beyond the designated time, they will not be visible on the books. However, by using suggest, you can still schedule into these.

3. **Display fields**: These are the fields that will show in a scheduled appointment on the scheduling grid. By clicking the up or down arrows, you can change the order in which they are displayed.

Icons Tab

By selecting any of the icons listed, a symbol will appear if the criteria are met. Example: if the Slot Icon "Comments" is checked a bubble will appear on the slot if any comments are entered.

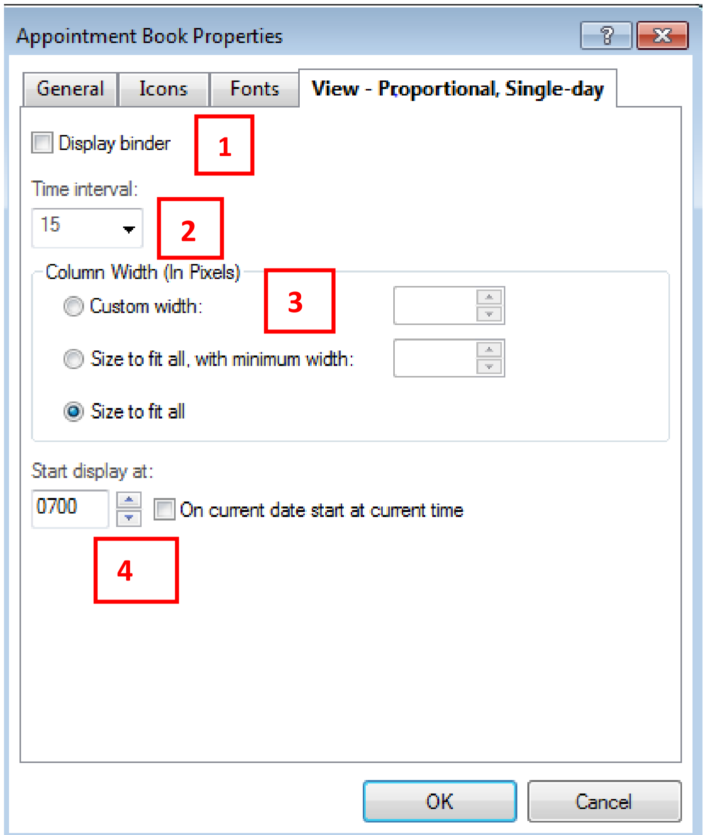


NOTE: Making changes to the default setting is not recommended.

Fonts Tab

Fonts as they appear in the appointment book can be changed using this tab.

View Proportional Single-day

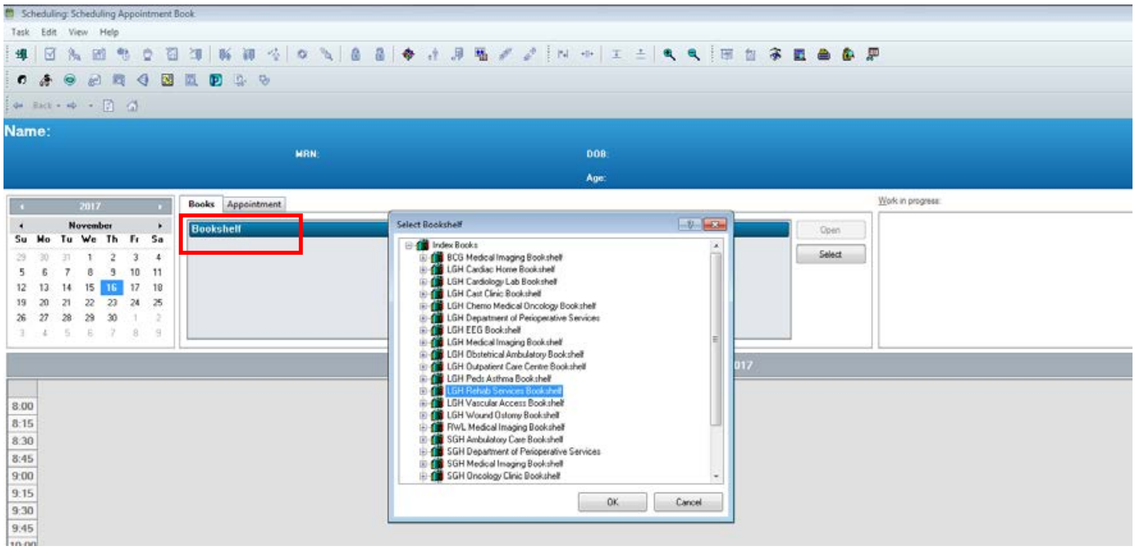


1. **Display binder**: By checking or un-checking this option, the binder on the left side of the appointment book will be visible or not.
2. **Time interval**: This option determines the increments of time (in minutes) for the slots.
3. **Custom width**: This option determines the width of the slots under the resources.
4. **Start Display at**: You can set the time and day that you wish to display when you first log on to the application.

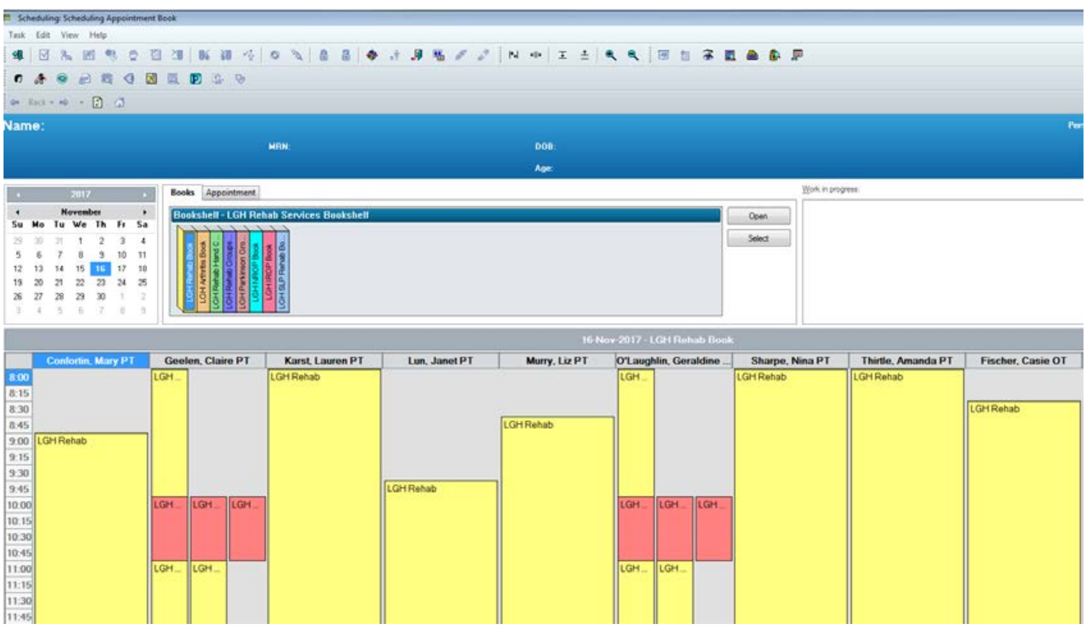
Opening a Bookshelf/Book

Follow the steps below to open a Bookshelf/Book in SchApptBook:

1. Click on the **Bookshelf** banner to select a **Bookshelf**.
2. Select the appropriate **Bookshelf** and click **OK**.



3. Double-click on a **Book** to open.



Appointment Inquiry

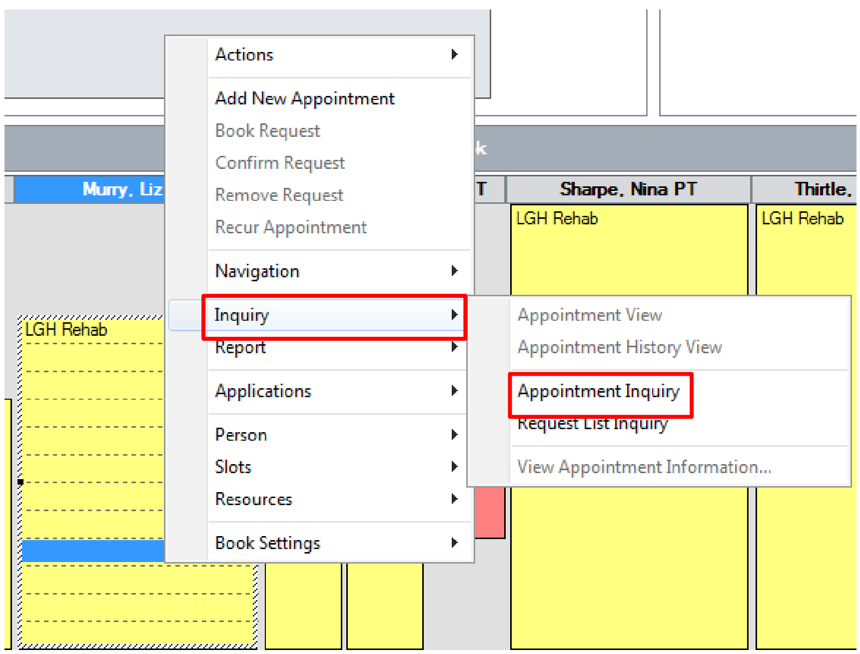
Appointment Inquiry allows the users to view appointments in a list format. "Schedule Inquiry" window allows you to enter the parameters required to view the schedule associated with a specific person or resource.

There are four available options for using the "Schedule Inquiry" window: Person tab, Resource tab, Location tab and Request List tab. Each of these is described below, along with the available elements for each tab.

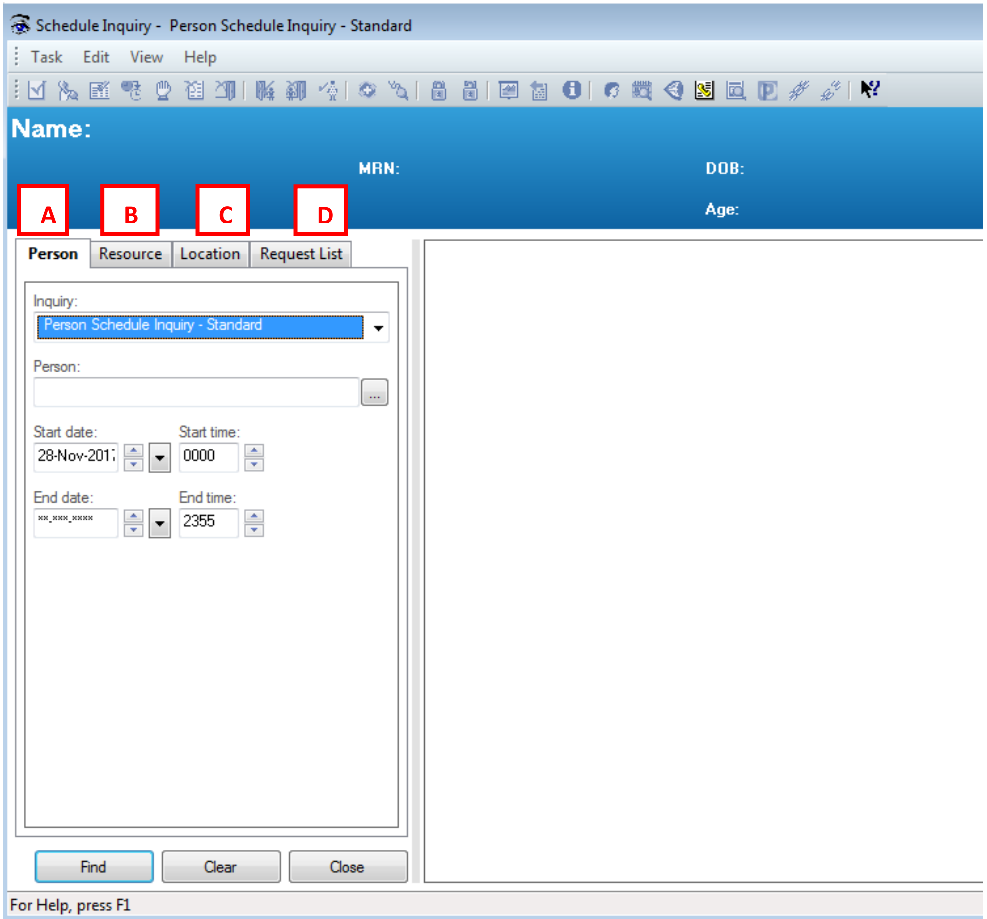
The Appointment Inquiry can be accessed in two different ways.

1. Click the **Appointment Inquiry icon** (eyeball) located at the top of your screen.

2. Right click anywhere on the scheduling grid, select "**Inquiry**", and then select "**Appointment Inquiry**."



3. The Appointment Inquiry window appears on your screen.



A. **Person Inquiry Tab**: Use this inquiry to view information (such as confirmed appointments, no-show, inquiry w/orders) associated with a specific person in the SchApptBook.
B. **Resource Inquiry Tab**: Use this inquiry to view information (such as displaced appointments, open slots available, booked outside of slot) associated with a specific resource in the SchApptBook.
C. **Location Inquiry Tab**: Use this inquiry to view information (such as location with person name, check-in, group session) associated with a specific location in the SchApptBook.
D. **Request List Inquiry Tab**: Use this inquiry to view information (such as request list by location, cancellation list, waitlist) associated with a specific request list in the SchApptBook.

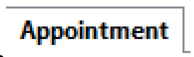
Select the appropriate parameters to run any of the above inquiries to view results.

Appointment Scheduling

There are several different methods for scheduling an appointment within the Scheduling Appointment Book application. This section will discuss each of these methods and explain when one method should be used over the others.

Pre-requisite Steps for Booking an Appointment

These are the pre-requisite steps for booking an appointment prior to selecting one of the three methods.

1. Click the **Appointment** tab 

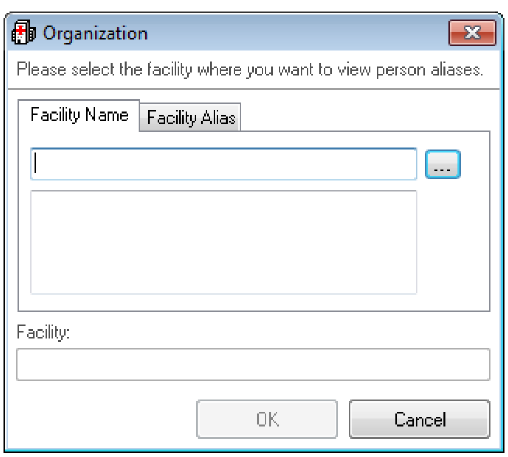
.
2. The first few fields for the required information appear in the window. You may begin to schedule the appointment.

   NOTE: Mandatory fields are marked with red asterisks (*) meaning you will need to complete these fields in order to move to the next step in scheduling an appointment.

3. Click the **Ellipsis** button beside the Person name field 
4. Search for the patient, by entering the **PHN**, then click **OK** (if you do not have a PHN, search by partial last name and first name or date of birth and gender).
5. If you have found the correct patient, click only ONCE on their name to select, then click **OK**.

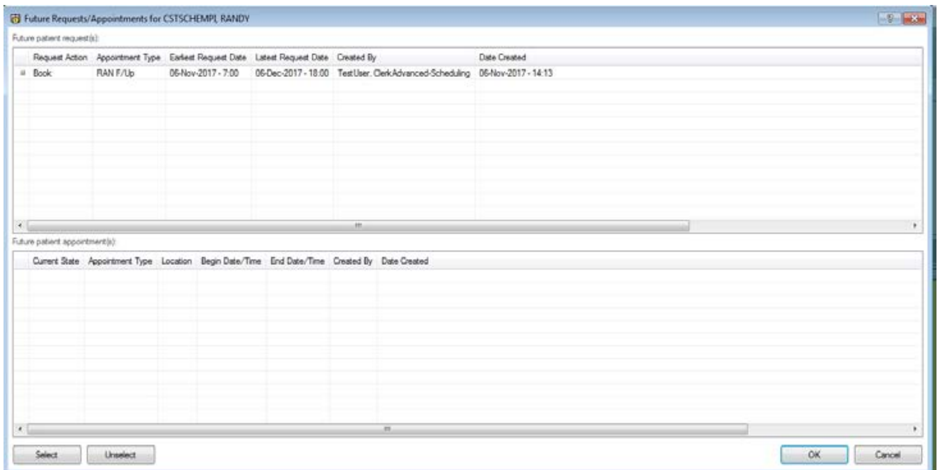
   NOTE: Refer to Registration's EMPI Reference material to learn about requesting a new PHN for a brand new patient. Approximately 99% of all **BC** Residents are registered in the EMPI.

6. The "Organization" window appears. Click on the **Ellipsis** button.



7. Scroll down through the list of the clinics until you see your clinic name, click on it to select it, then click **OK**.

8. The EMPI window will appear momentarily as your patient is checked against the EMPI database.
9. The “Future Requests/Appointments” window will appear for the patient if they have appointments that are booked in the future. Click **OK** to close the window.



10. The patient’s name will now display in the **Person Name** field.
11. Click the **Ellipsis** button beside the **Appointment Location** field and double click on your clinic location name to select as the appointment location.

    NOTE: The Appointment Location and Appointment Type may be defaulted based on user preferences.
12. Select the **Ellipsis** beside the **Appointment Type** field and double click on an appointment type to select.
13. Once an Appointment Type is selected, additional fields will appear.

    NOTE: This list of fields is referred to as “Accept Format Fields.”
14. Complete any mandatory fields and click the **MOVE** button to move the appointment into the **Work In Progress (WIP)** area.

NOTE: If Yes is entered into the "Interpreter Required?" an interpreter must be scheduled. Interpreters are not scheduled in Cerner.

Three Methods of Booking an Appointment

Once the appointment information is in the WIP, use any of the following three methods (Drag & Drop, Suggest, Schedule) to move the request into a "Pending" status on the scheduling grid.

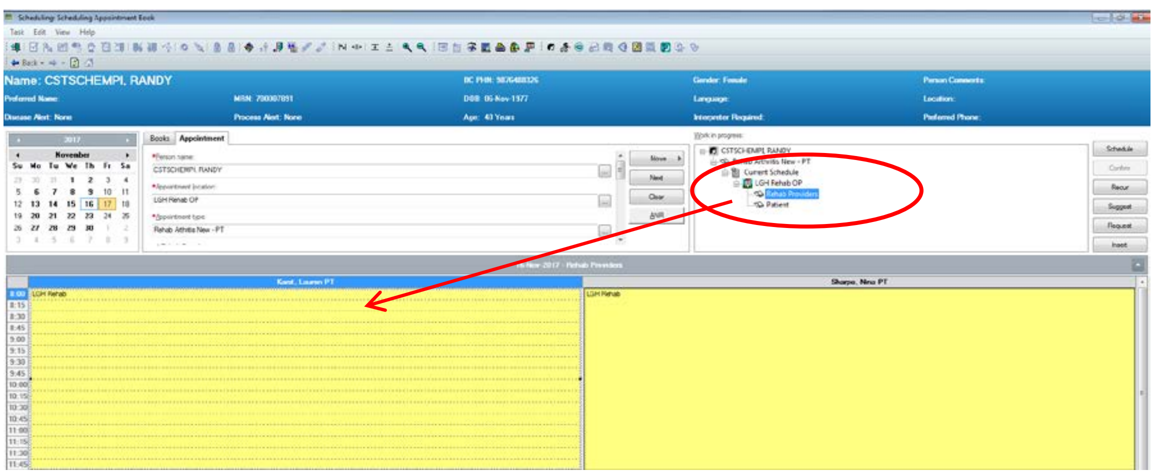
A. Drag and Drop Method

The drag and drop functionality is a quick and simple method for scheduling single appointments. It should be used when you need to schedule an appointment in a pre-determined date and time. This method works best for clinics that do not book appointments too far into future. This method is not recommended when an appointment needs to be scheduled to multiple resources.

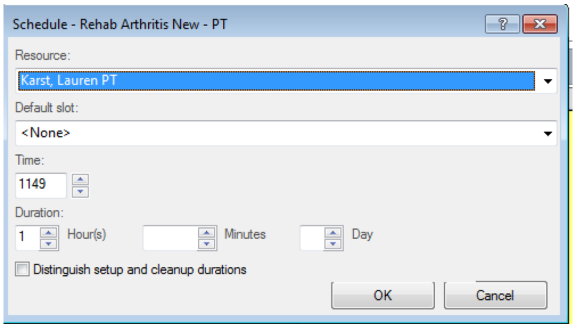
Highlights:

- Quick method for booking a single appointment.
- Allows you to schedule an appointment to a pre-determined date and time.
- Works well for clinics that do not book appointments far in advance.

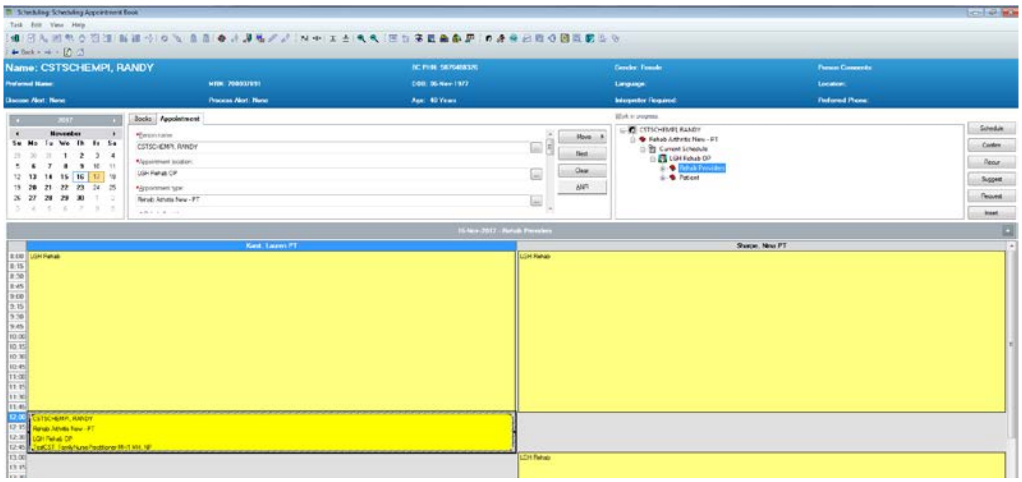
I. Left click on the selected resource (the resource directly below the clinic name) and drag the cursor to the appropriate resource and start time.



II. Once the mouse button is released, the Schedule window will display on the screen. Verify that the Resource and the time slot fields are correct. After reviewing the information, click **OK**.



III. The appointment will show in the slot in a pending state, which will be denoted by the red books in the **WIP**.



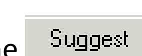
IV. The appointment will appear in the scheduling grid in a “Pending” state.

B. Suggest Scheduling Method

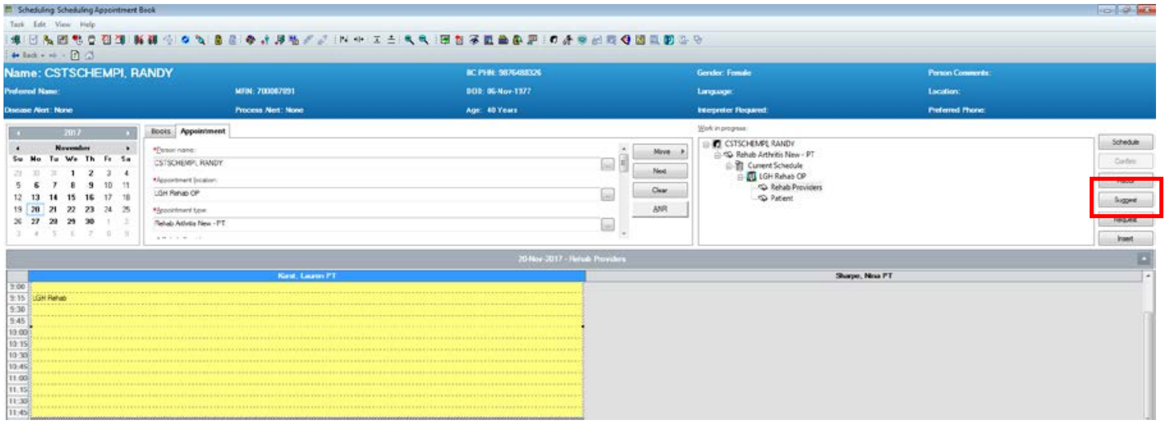
The system can suggest available times at which an appointment can be scheduled based on date and time parameters that are set. This provides available date and time options without having to search through the scheduling grid. This method is recommended for those areas where available appointment times are limited and also for more complicated appointments.

Highlights:

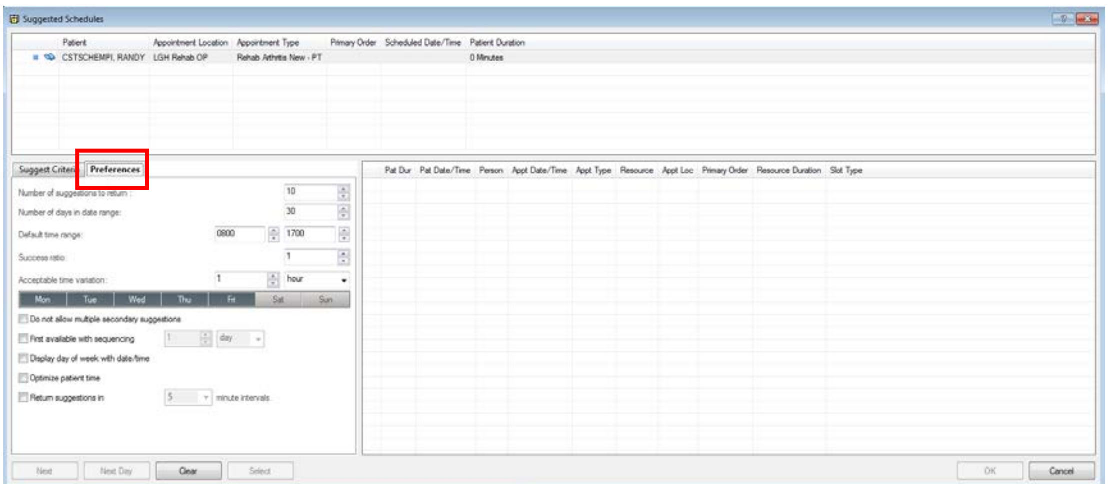
- Helps you to find the FIRST available appointment at the clinic.
- Allows you to set a date range for the appointment search.
- Avoids scheduling conflicts (resources/patients will never be double-booked).
- Results in the least amount of booking errors.

I. With your appointment in the Work In-Progress area, click the 

button to open the Suggested Schedules window.



II. If Preferences need to be modified (for example: the number of options returned), click on the **Preferences** tab in the “Suggested Schedules” window.



III. Click  for the system to display suggested times that the appointment could be scheduled.

IV. If the suggested times do not work, click **Next** to display the next available times.

V. If the suggested dates do not work, click **Next Day** to display the available times for the next day.

VI. Once you have found a suggested date and time to use, click **Select**. Click **OK** to close the “**Suggested Schedules**” window and schedule the appointment.

VII. The appointment will appear in the scheduling grid in a “Pending” state.

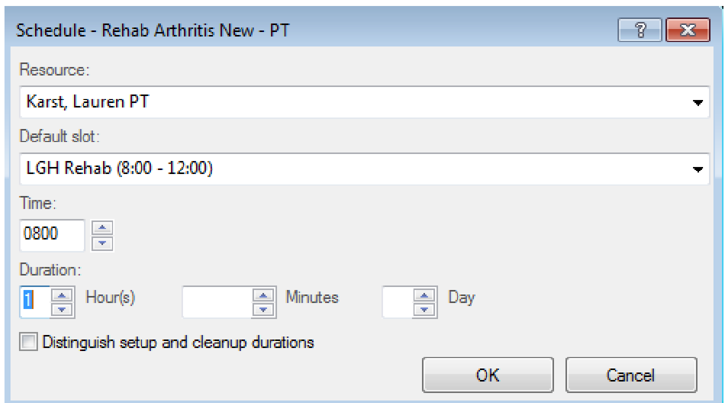
C. Schedule Button Method

The **Schedule** button allows the user to view the default selections such as duration and slot. Within one window, the user can verify or change the resource, duration, slot, and time using the dropdown boxes that display available options. It is the **least** recommended method for booking regular appointments as users can accidentally book appointments outside the slot resulting in double-booking.

Highlights:

- Allows you to pre-select the time slot you would like to schedule to.
- Allows you to view/modify the appointment Resource, Slot, Start time and Duration.
- Allows you to book appointments outside of slots when required.

I. With the appointment in the WIP, select the preferred time and resource in the scheduling grid and click the **Schedule** button.

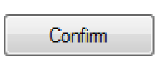


II. If necessary, modify any of the fields (Resource, Default Slot, Time and Duration) and click **OK**.

III. The appointment will appear in the scheduling grid in a "Pending" state.

Confirming an Appointment

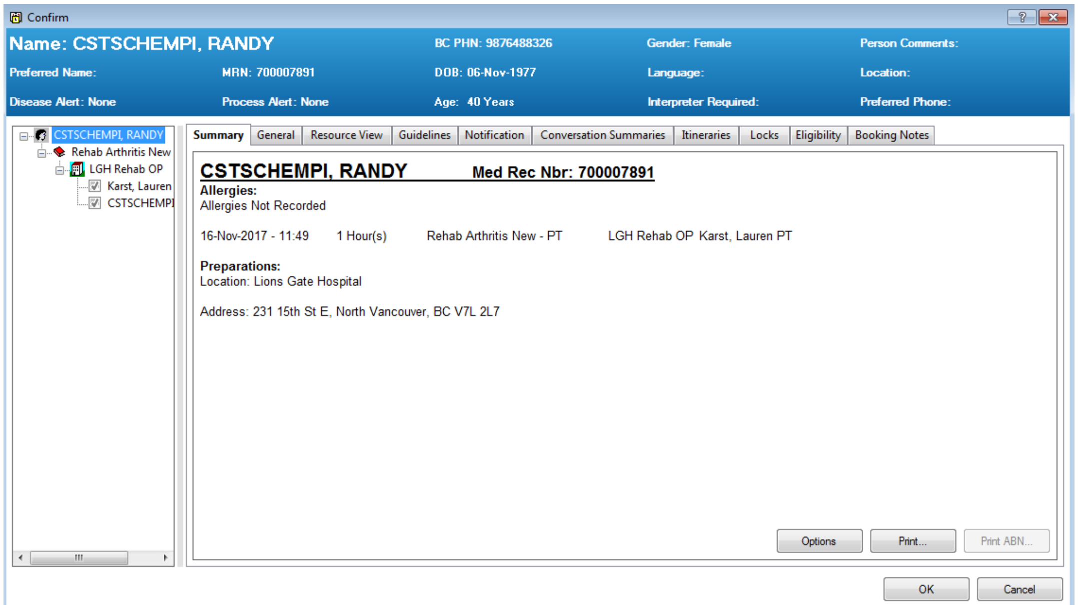
Once the appointment moves to the "Pending" status in the scheduling grid (using any of the above three methods), follow the below steps to **Confirm** and create a **Pre-outpatient Encounter** for the appointment.

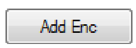
15. Click the 

button to confirm the appointment. The Confirm window will display a summary of the appointment including any patient preparations/instructions.

16. Click **OK** in the Confirm window.

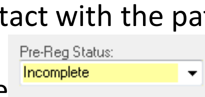
NOTE: At your clinic, you may print and give a copy to the patient by using the "Print" button at the bottom of this Summary page.



17. The Encounter Selection window will open with the patient's previous and current encounters. Click on the  button to create a new encounter for this appointment.

18. The "External MPI" window appears momentarily to ensure you have the most up-to-date demographics on the patient.

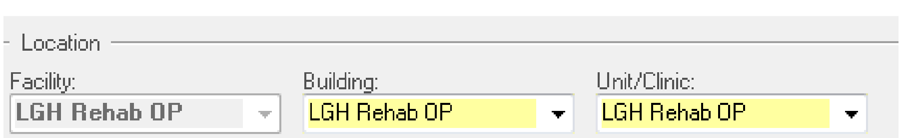
19. The "Pre-Register Outpatient" window will appear for you to complete the pre-registration. Only the **Patient** and **Encounter Information** tabs are necessary to complete a pre-registration.

20. If you are not in contact with the patient to confirm the information, leave the Pre-Reg Status as Incomplete . If you are in contact with the patient to verify all the information, update the Pre-Reg Status to **Complete**.

21. In the Patient Information tab  verify the demographic information on every visit.

22. Click on the Encounter Information tab.

23. In the Location section, the Facility is auto-populated. Verify that the Building and Unit/Clinic are correct.



24. In the Current Encounter Information section, complete the mandatory fields as below:

Encounter Type: Pre-Outpatient

Medical Service: Select one from the drop-down list

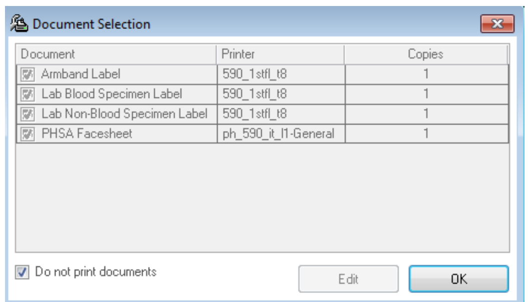
NOTE: the Reason for Visit carries over from the appointment.

25. The other fields are not mandatory on the Pre-outpatient Encounter.

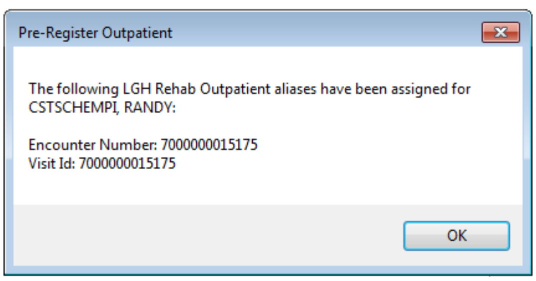
    NOTE: the Estimated Arrive Date and Time are auto-populated from appointment date and time.

26. Click **Complete** to finish.

27. The "Document Selection" window displays. Uncheck the "Do not Print Documents" checkbox to print any relevant documentation. Click **OK** to complete.



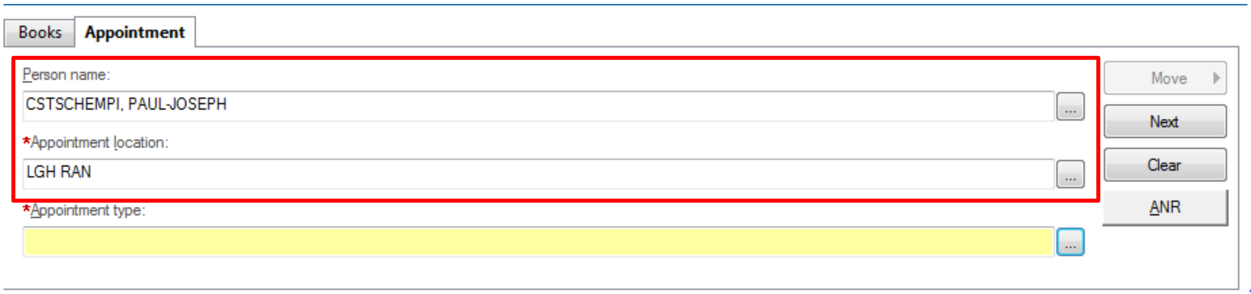
28. The "Pre-Register Outpatient" window displays. Verify and click **OK**.



Inpatient Scheduling

Patients with current “Inpatient Encounter” may require care from the Outpatient clinics. The below steps are used for booking appointments for these patients with Inpatient Encounters in the SchApptBook.

1. Follow the steps (1 to 14) from **Appointment Scheduling - Pre-requisite Steps for Booking an Appointment** to fill in the Person Name and Appointment Location fields in the accept format.

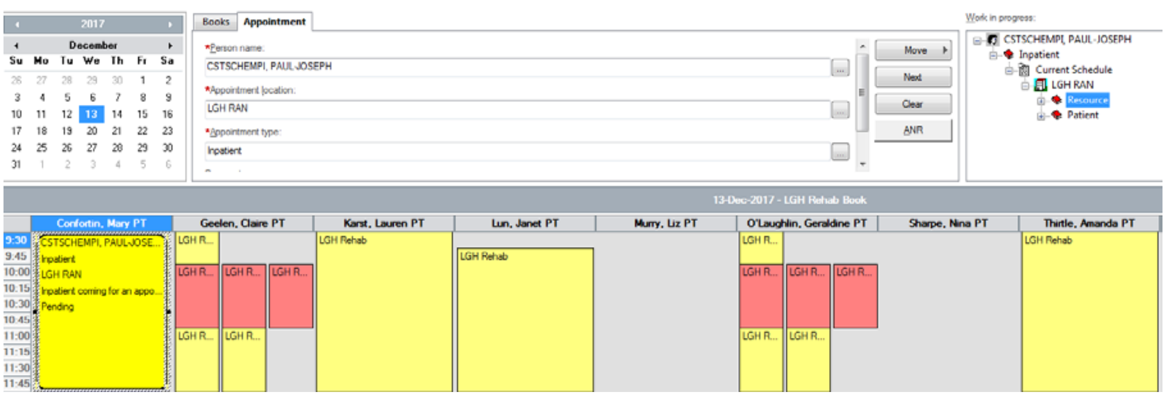


2. Complete the below mandatory fields and click **Move** button:

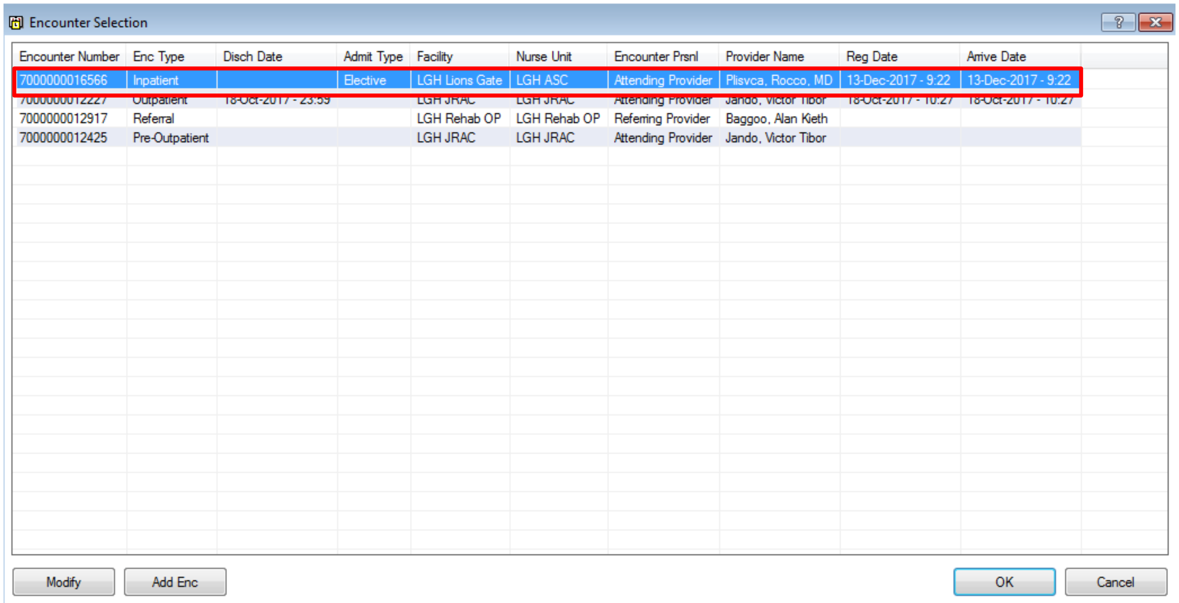
   Appointment Type: Inpatient

   Comments: add any applicable comments

3. From this point, use either “**Drag & Drop**” or “**Schedule**” button to book a “Pending” appointment. Click **Confirm** button.



4. Click **OK** to close the “Confirm” window.
5. Select the existing “Inpatient” encounter and click **OK**.



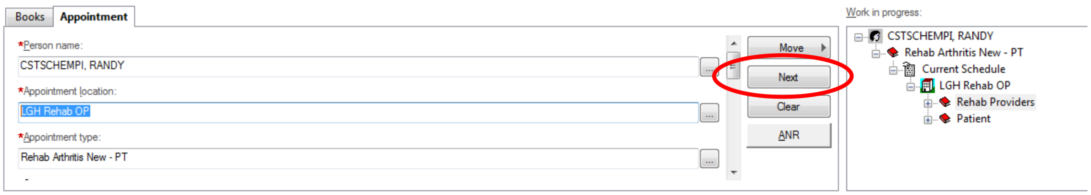
6. The appointment is booked with an Inpatient encounter.

Appointment Scheduling – Advanced

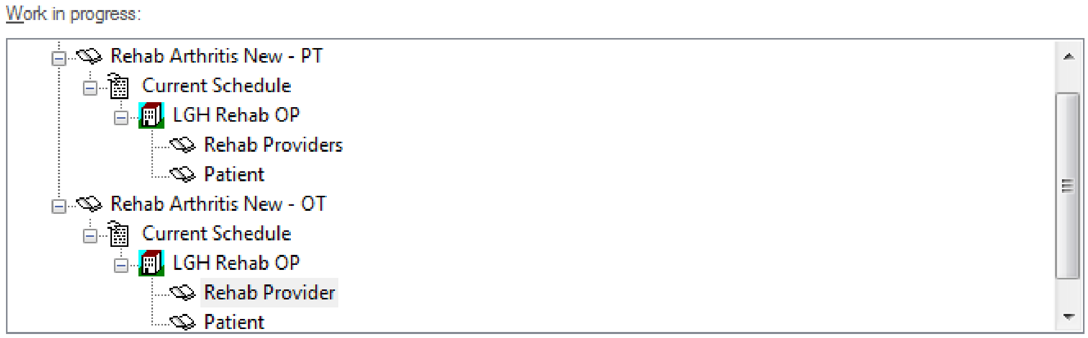
Booking Multiple Appointments for a Patient

The **Next** button can be used to schedule multiple appointments for the same patient without re-entering the fields in the Appointment tab. The “Appointment Type” can be the same or different.

1. Enter in appropriate information into the fields on the Appointment Tab and press the **MOVE** button to move the information to the Work-In-Progress (WIP).



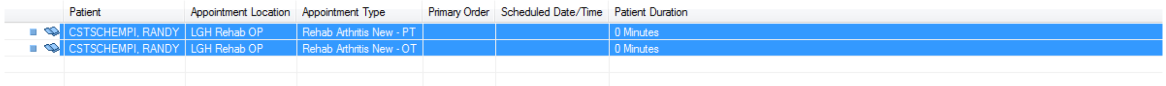
2. Once you have entered in all of the information for the first appointment, press the **NEXT** button. Your cursor will move back to the fields within the Appointment tab.
3. Select the appropriate **Appointment Location**.
4. In the **Appointment Type** field, replace the first Appointment Type name with the next appointment type that you are scheduling and press enter or the ellipses button to search. Select the appropriate Appointment Type from the search window.
5. Scroll down through the rest of the fields. You will notice that the information entered for the first appointment has been retained. Change any appropriate information and press the **MOVE** button.
6. Both appointments will now display within the WIP.



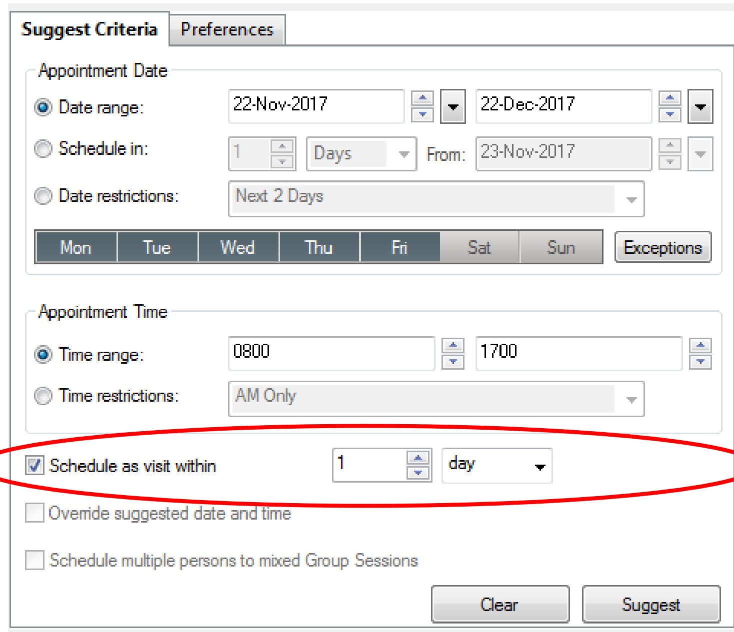
7. Press the **Suggest** button to allow Suggested Scheduling functionality to help you find an available appointment time. The “Suggested Schedules” window will display.

   NOTE: Once the appointments are in the WIP, it is possible to use any of the scheduling options to book them.

8. Press your Shift key and highlight both appointments.

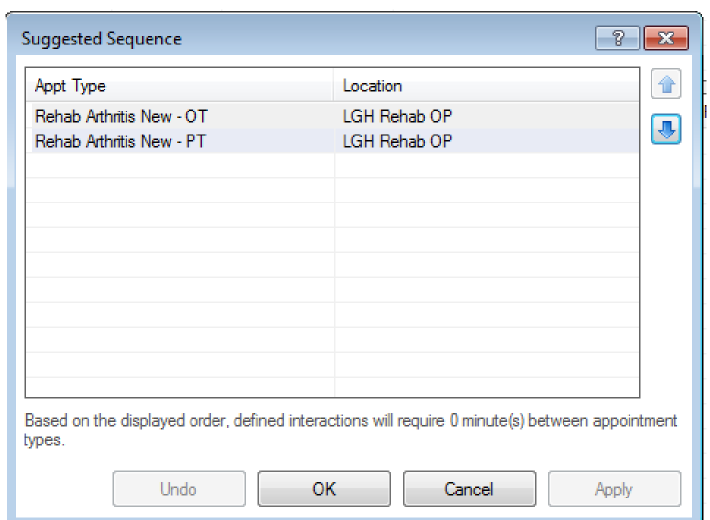


9. In the lower left portion of your screen, click the checkbox next to "**Schedule as a visit within.**" Leave the timeframe defaulted to 1 day. This will allow you to find an available appointment time for both appointments within a one day timeframe.



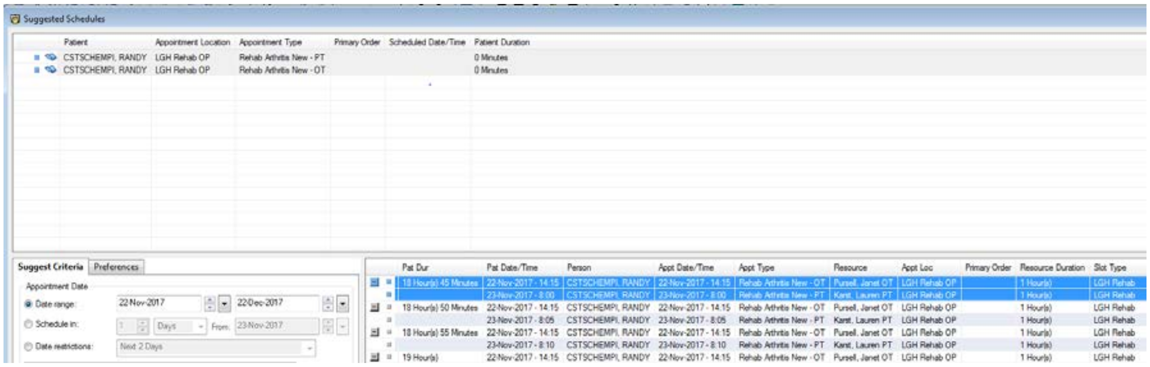
10. Press the **Suggest** button.

11. The "Suggested Sequence" window will display. This allows you to indicate to the system which appointment you would like to schedule first. Leave the appointments in the order they defaulted and press the **OK** button.

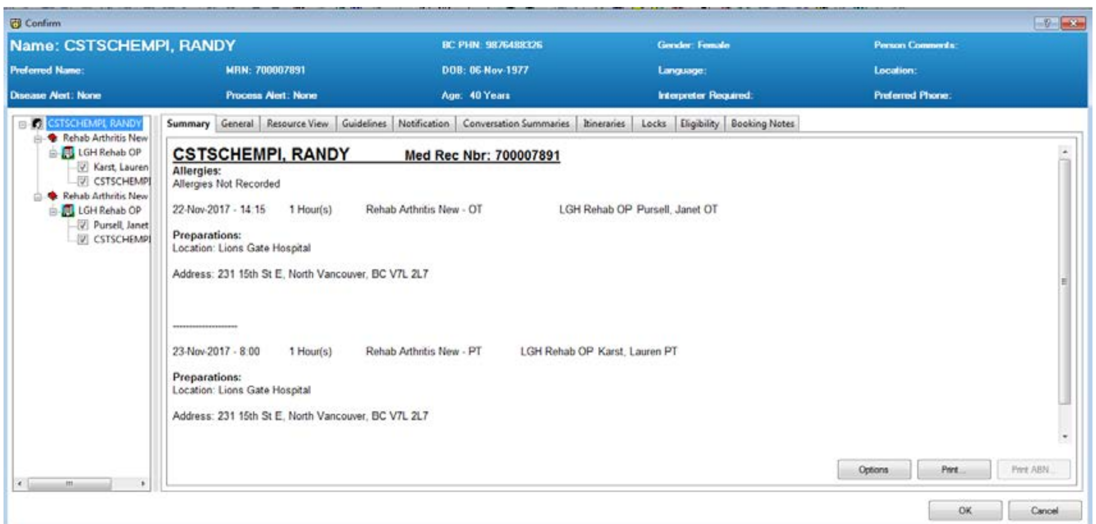


NOTE: By default the Appointment Type sequence is in alphabetical order.

12. In the lower right portion of the screen, you will see times which are available for booking both appointments.



13. Highlight one of the available times and press the **SELECT** button.
14. Press the **OK** button and both appointments will display in the WIP in a "Pending" status.
15. Highlight the patient's name, press the **CONFIRM** button, and the "Confirmation" window will display a summary of both appointments.



16. Press the **OK** button. Follow the steps (20 to 33) from Appointment Scheduling to complete scheduling each appointment with a Pre-outpatient encounter.

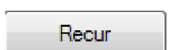
Recurring Appointments

Recurring appointment functionality is designed to help in situations where the same appointment type needs to be scheduled multiple times over a specified time period. For example, a Rehab patient may be scheduled for a bi-weekly therapy session for 10 weeks.

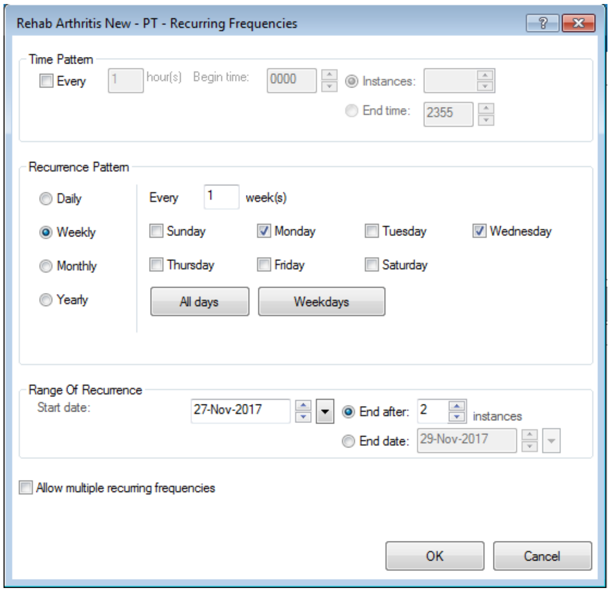
The following Appointment Types can be associated with Recurring encounters:

a. Rehabilitation: Physiotherapy/Occupational Therapy/Speech Language Therapy
b. IV Therapy (Medical Day Care)
c. Chemotherapy (Chemo Injection Visit)
d. Radiation Therapy (RT Treatment Visit)
e. Hemodialysis
f. Mental Health
g. Wound Care
h. Nuclear Medicine
i. Breath Program: Education & Maintenance Groups

Scheduling a Recurring Appointment

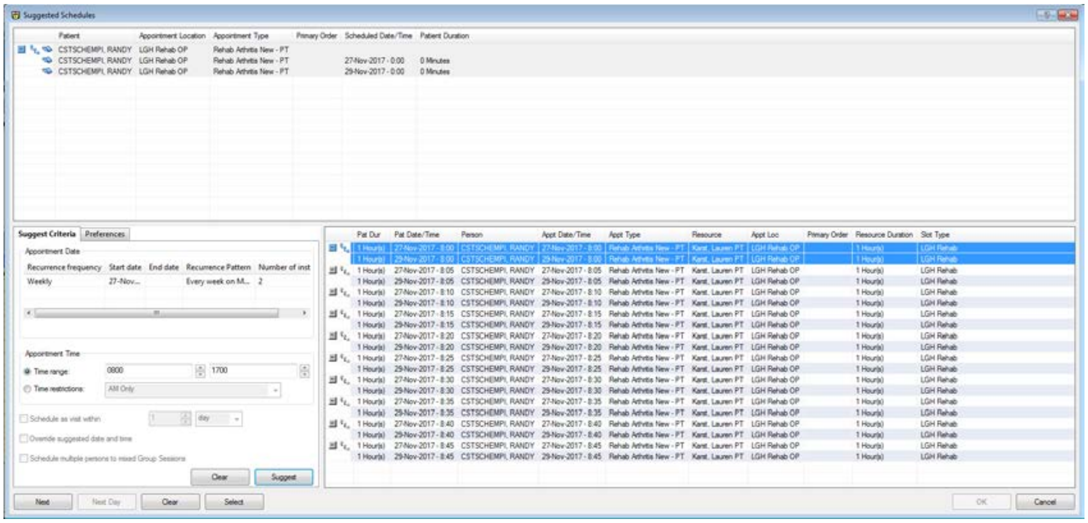
1. Open the Scheduling Appointment Book application, click the Appointment tab, and fill out the accept format fields the same as in previous examples. Press the **MOVE** button to move the information to the WIP.
2. Click the 

button. The “Recurring Frequencies” window will display.
3. Within the Recurrence pattern area, you have many different options to choose from when selecting the frequency of the appointment. You have the option to select which day of the week the patient should be scheduled in addition to the frequency (i.e. daily, weekly, monthly, yearly). For example: you many choose to pick every Monday and Wednesday of each week.
4. In the Range of Recurrence area, select the date which you would like the appointments to begin and how many instances of the appointment need to be scheduled (an end date can be entered instead of number of instances).
5. The “Allow multiple recurring frequencies” option allows you to select different types of frequencies for different days of the week. For example, you might choose to schedule the appointment for every Monday, but only want to schedule the appointment for every other Wednesday.

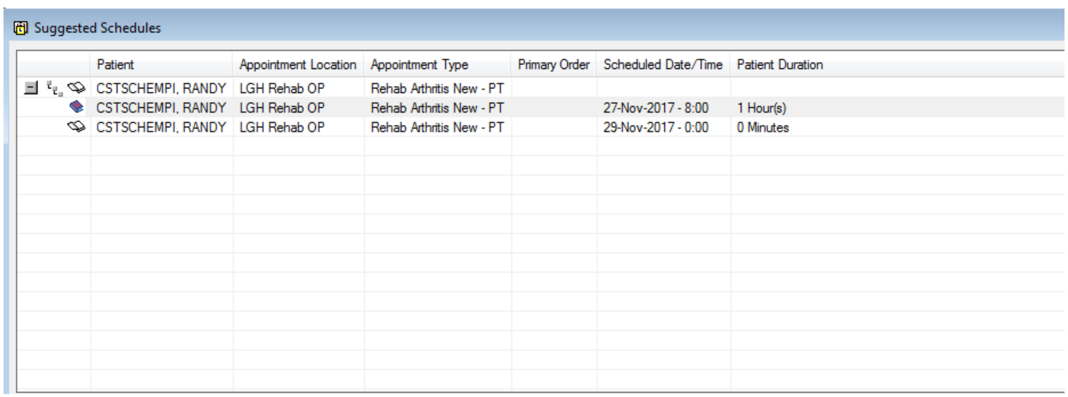


6. Once you have made your selections, press the **OK** button.
7. The information for all instances of the recurring appointment will display in the WIP.

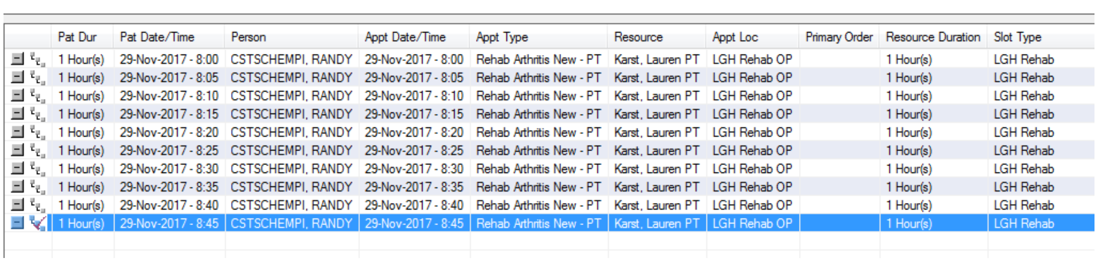
8. Suggested Scheduling is the best method for finding available appointment times for multiple appointments at once. Press the **Suggest** button.
9. All appointments will display in the top portion of the “Suggested Schedules” window. Press the **Suggest** button.
10. Available appointment options will display on the right portion of the screen. Notice that the results include available appointment times for all appointments within the recurring series.
11. Highlight one of the options and press the **SELECT** button. A red check mark will display next to the selected appointment times.



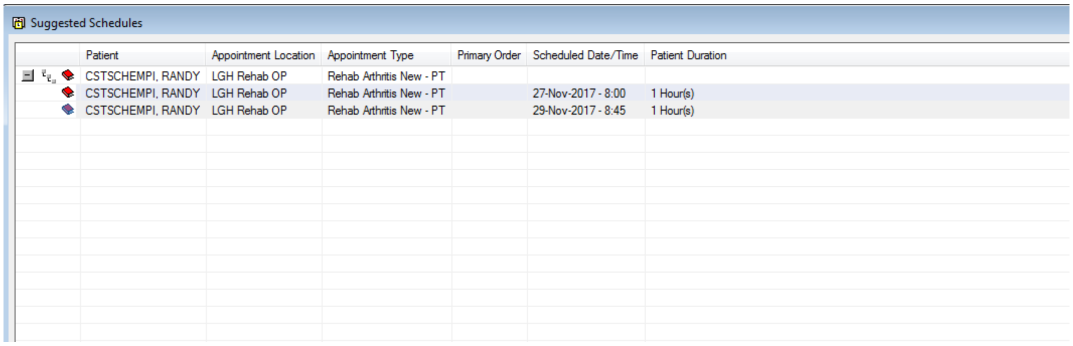
12. The system will typically return an option which has all the appointments within the recurring series occurring at the same time of day for each of the appointment dates. In the example above, the suggestion was 8:00 am. You have the option to search for an alternative time for one or multiple components within the recurring series.
13. In the upper section of the "Suggested Schedules" window, select one component of the recurring series.



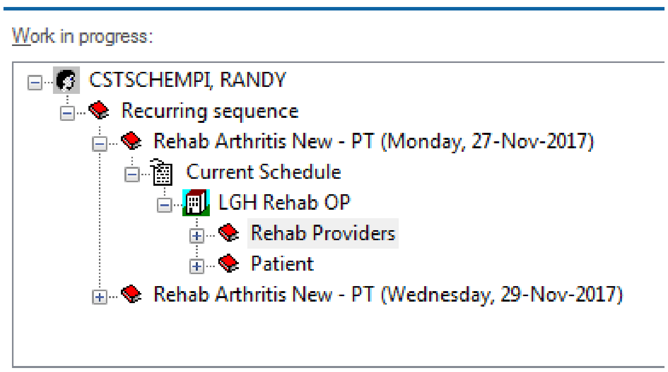
14. Press the **SUGGEST** button again. This time the system will return appointment suggestions only for the highlighted appointment. Highlight a different time option and press the **SELECT** button.



15. You will notice that the appointment time has now changed for just that particular component of the recurring series.



16. Press the **OK** button. All appointments will appear in a "Pending" status within the WIP.



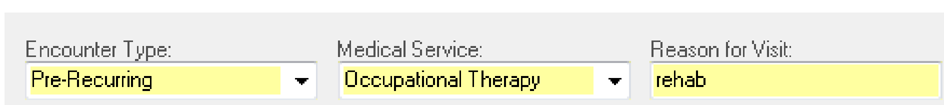
17. Press the **CONFIRM** button and the "Confirmation" window will display with a summary of each appointment. Press the **OK** button to close this window.

18. Follow the steps (20 to 28) from the "Appointment Scheduling – Confirming an Appointment" section to create an Encounter for the first appointment.

19. In the Current Encounter Information section, complete the below blank mandatory fields:

    Encounter Type: Pre-Recurring

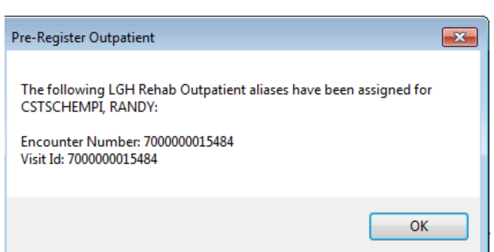
    Medical Service: select from the drop-down list



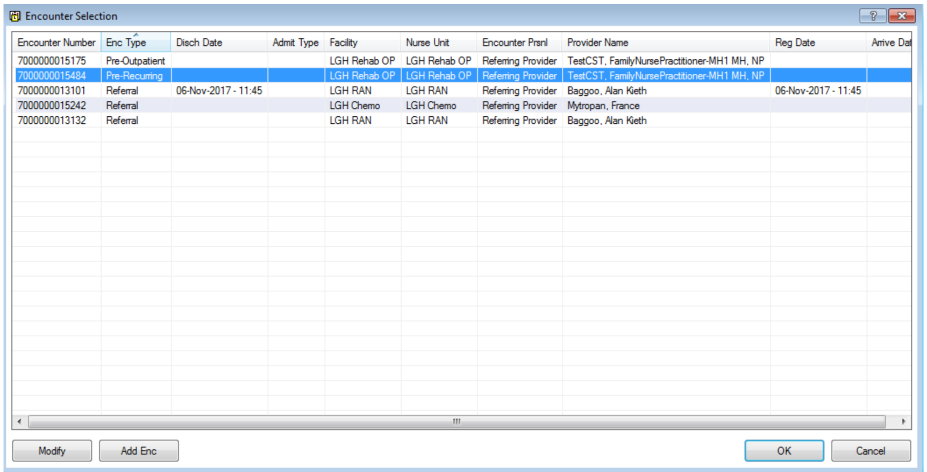
20. Click **Complete** to finish.

21. The Document Selection window displays. Click **OK** to complete.

22. The Pre-Register Outpatient window displays. Verify and click **OK**.



23. The "Encounter Selection" window re-opens for the second appointment.
24. Select the already created "Pre-Recurring" encounter number for the second appointment from the selection window.



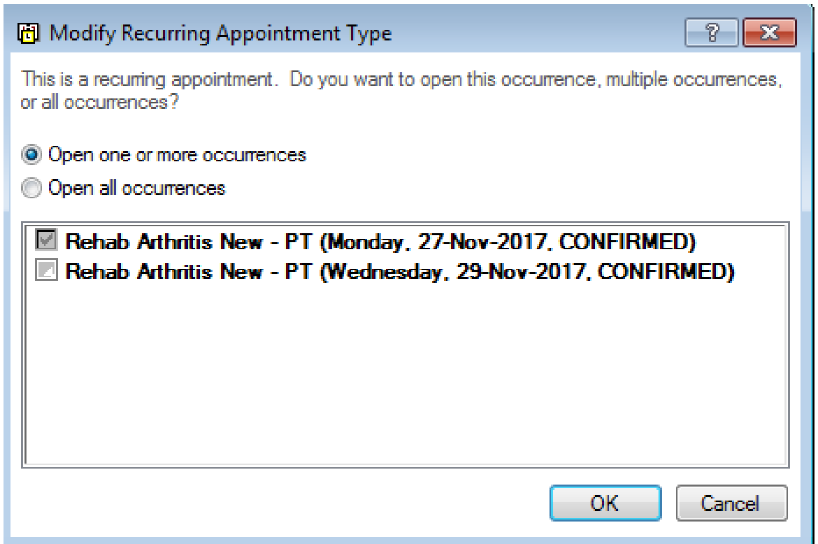
25. Click **OK** to close the window.

NOTE: The Recurring encounter will have to be manually discharged once the course of treatment is complete.

Modify a Recurring Appointment

When a recurring appointment is scheduled, the system will always recognize that these appointments are attached together. If you are to perform any action on any one of these appointments, the system will always ask if you intend to perform the action on just one component or all components within the recurring series.

A message similar to the following will display when performing an action (example: Actions ---> Modify or Actions ---> Reschedule) on an appointment scheduled within a recurring series:



If you choose to open one or more occurrences, then the action will only affect those appointments that have a checkmark. If you choose "Open all Occurrences", then the action will affect all appointments within the recurring series.

Refer to the "Appointment Reschedule" section to learn more about how to reschedule an appointment.

Group Appointments

Group appointment functionality allows you to schedule multiple patients to the same resource all at the same time. This functionality is commonly used in areas that are conducting classes or group therapy.

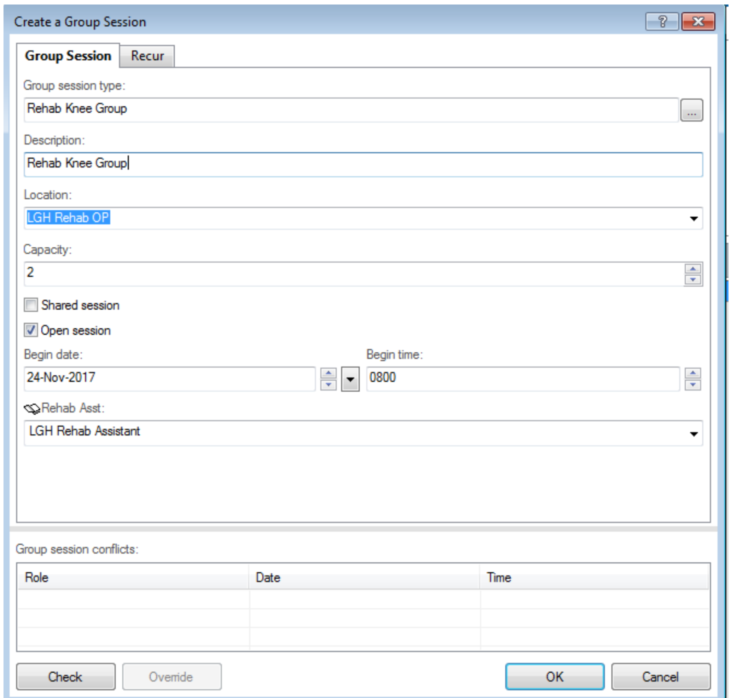
Create Group Sessions

Prior to scheduling a Group Appointment Type, a Group Session must be created. To create a group session, complete the following steps:

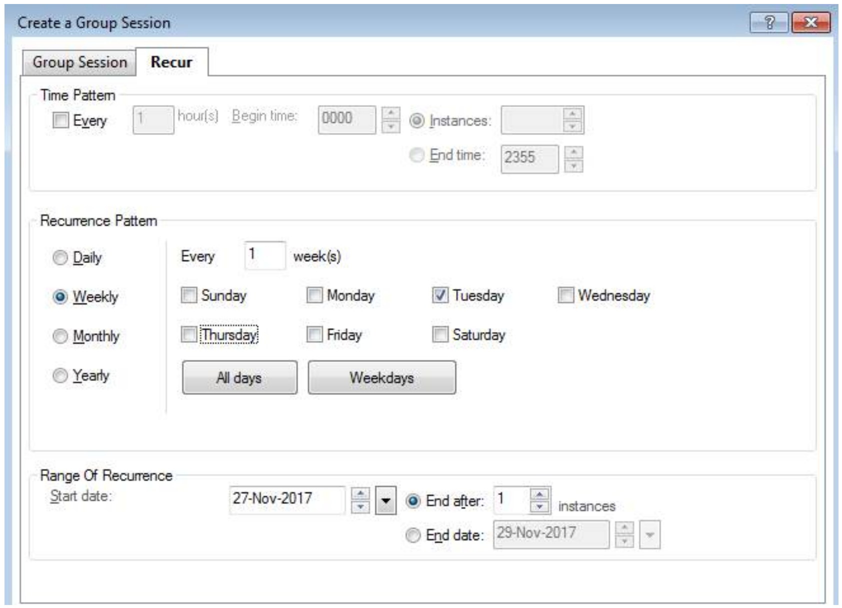
NOTE: To be able to create the group sessions, the resource must have an open slot on their calendar for the date and time of the group session. Please refer to section Adding Slots for a Day. From the Task menu in SchApptBook, select **Group Session** -> **Create**. The Create Group Session window will display.

1. In the **Group Session Type** field, type in the name of the Group Appointment Type and press **Enter** or the Ellipses button.
2. In the **Description** field, type a more detailed description of the session that the scheduler will understand; such as "8:30 am Diabetic Ed Session."

3. The **Location** field will be defaulted with the location associated to the group appointment type.
4. Enter the **Capacity** of the group.
5. If "Shared Session" attribute is checked, the group session can be scheduled with other available group sessions otherwise it is non-shared.
6. If "Open Session" attribute is unchecked, indicates the session is closed and should not allow scheduling into any of the reoccurring group sessions after the first group session begin date.
7. In the **Begin Date** field, place the date that this session should start.
8. Change the **Begin time** to a time corresponding to the time of the session.
9. Leave the next field as it defaults with the resource for the group session.



10. Click the **Recur** tab.
11. In the Recurrence pattern section, specify the appropriate recurrence pattern of the group. For example: a group that happens every Tuesday, click on the "Weekly" radio button and unselect every day except for Tuesday (see screenshot). In the Range of Recurrence, specify a start date. There is an option to specify an "End Date" or have the recurrence end after a specified number of instances.



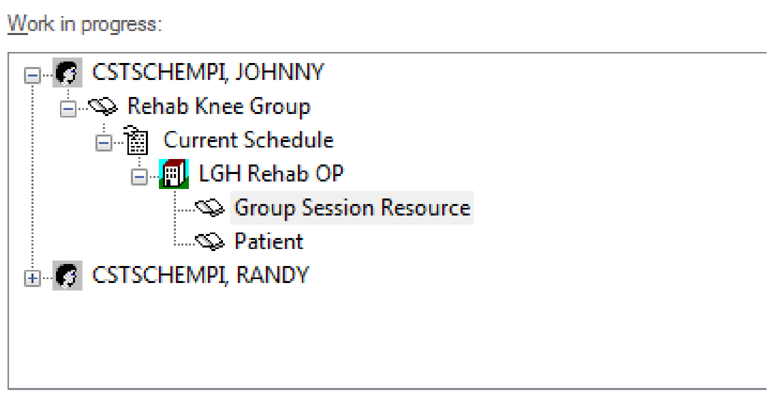
12. Press the **OK** button in the lower right corner of the window.

Group Appointment Scheduling

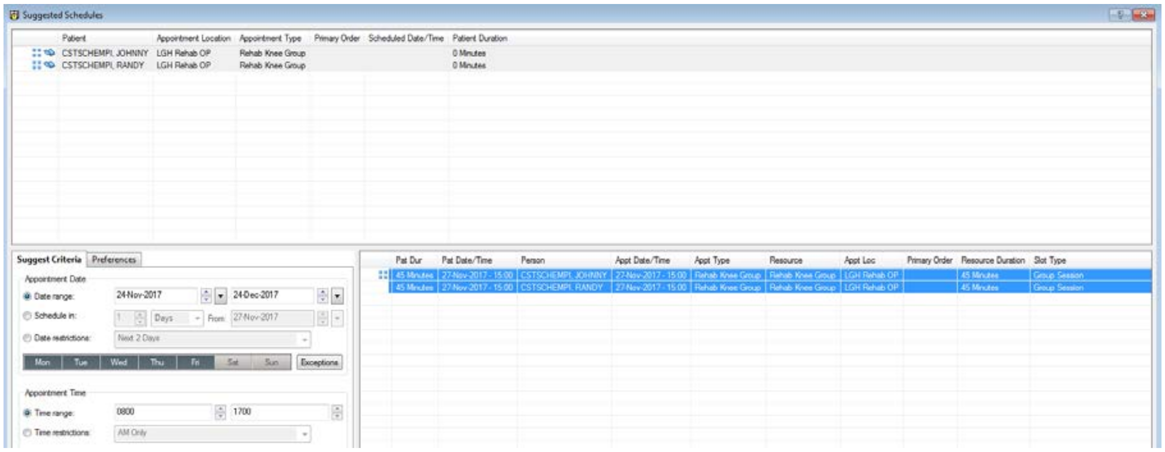
1. To schedule a group appointment, click on the **Appointment Tab**.
2. Click the **Ellipsis** button beside the Person name field.
3. Search for the patient, by entering the **PHN**, then click **OK** (if you do not have a PHN, search by partial last name and first name or date of birth and gender).
4. If you have found the correct patient, click only ONCE on their name to select, then click **OK**.
5. Select a **Facility Name** in the “Organization” window.
6. The EMPI window will appear momentarily as your patient is checked against the EMPI database.
7. The “Future Requests/Appointments” window will appear for the patient if they have any appointments booked in the future. Click **OK** to close the window.
8. The patient’s name will now display in the **Person Name** field.
9. Enter an **Appointment Location** and the name of the **Appointment Type**.
10. Scroll back up to the **Person Name** field. Notice that the field changes to allow for multiple patients. This is because group appointment types allow for booking multiple patients to the same resource at the same time.

11. In the **Person Name** field, clear out the first patient's name and type in the name of your second patient. The "Person Search" window will display. Follow the same steps (3 to 8) from above to select the appropriate patient from the list and press the **OK** button.
12. Both patients should now display.

13. Scroll down and fill out the remaining accept format fields.
14. Press the **Move** button and the information for both patients will display in the WIP.

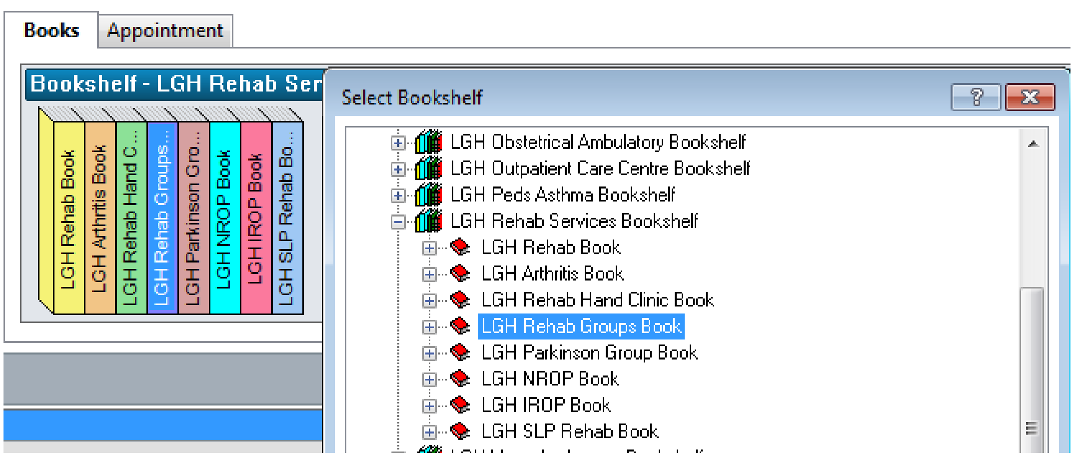


15. Use Suggested Scheduling to help find an available appointment time. Press the **Suggest** button.
16. In the Suggested Schedules window, press the **Suggest** button.
17. An available time will display. Press the **Select** button and then press **OK**.

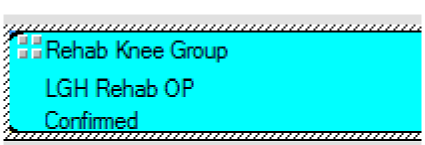


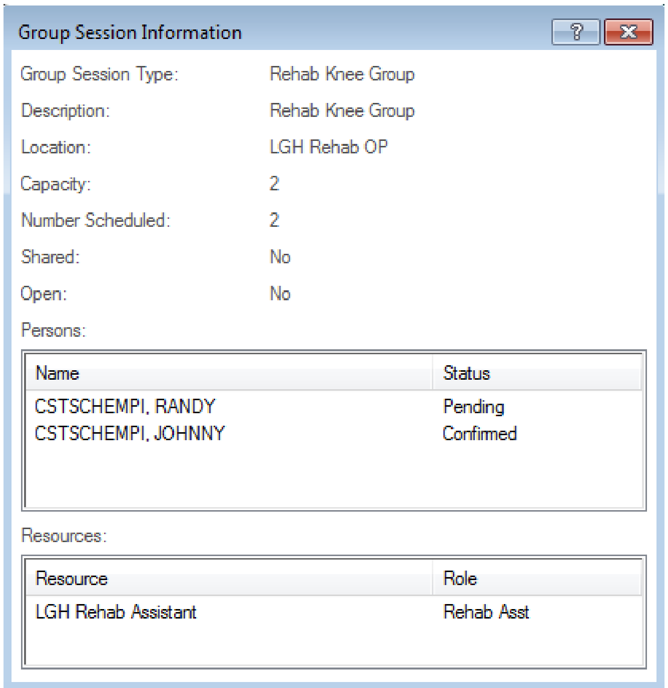
NOTE: The Suggest function only returns one appointment option for group appointments. To view additional options, you must select the "**Next**" button on the bottom left corner.

18. Press the **Confirm** button to view the summary info.
19. If your appointment is designed to require an encounter added at the time of booking, then the "Encounter" selection window will display. Either select an existing encounter, or press the **Add Enc** button to generate a new encounter.
20. Click on the **Bookshelf** bar. Select the bookshelf for the department which schedules the group appointments from the list of Bookshelves. Press the **OK** button.



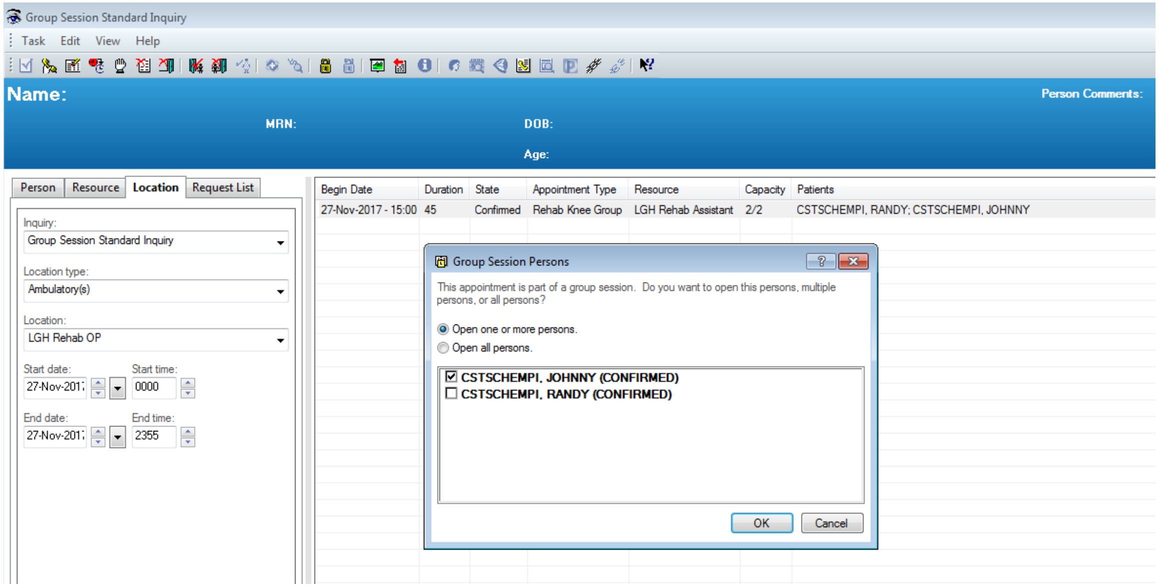
21. Double click on the appropriate book. You should see the resource that performs the group appointments and the available sessions for the day.
22. Press the **Group Session** icon within the session that you just booked. The "Group Session Information" window will display.





Group Appointment Cancellation and Group Session Inquiries

1. Open Appointment Inquiries by clicking on the  icon at the top of the screen. The “Appointment Inquiries” window will display.
2. Use the arrow buttons to navigate to the **Location** tab. Click on this tab.
3. Choose “Group Session Standard Inquiry” from the Inquiry dropdown.
4. Choose “Ambulatory” from the Location Type dropdown and “Appointment Location” from the Location dropdown.
5. Ensure that your date range is set to include the appropriate timeframe and press the **Find** button.
6. Highlight the appropriate group session, right click and choose **Cancel**. The “Group Session Persons” window will display. There is an option to select a single patient, multiple patients or the entire group.
7. Select **OK** to close the “Group Sessions Persons” window and proceed with cancelling the selected patient(s).

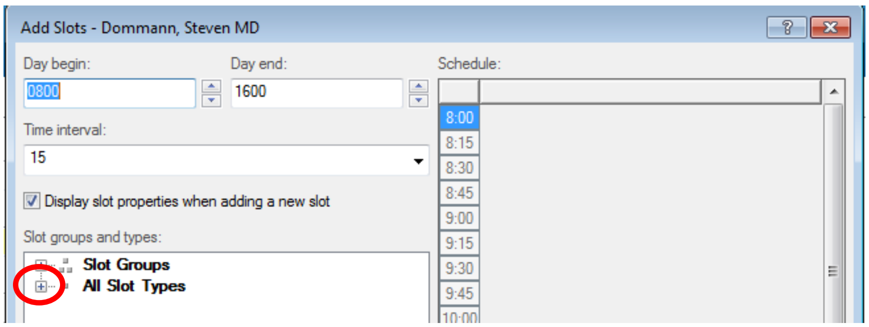


8. The Cancel window will display. Select the appropriate cancellation reason from the dropdown and press the **OK** button.
9. You will now see the Capacity number decrease for the session which your patient was originally booked.

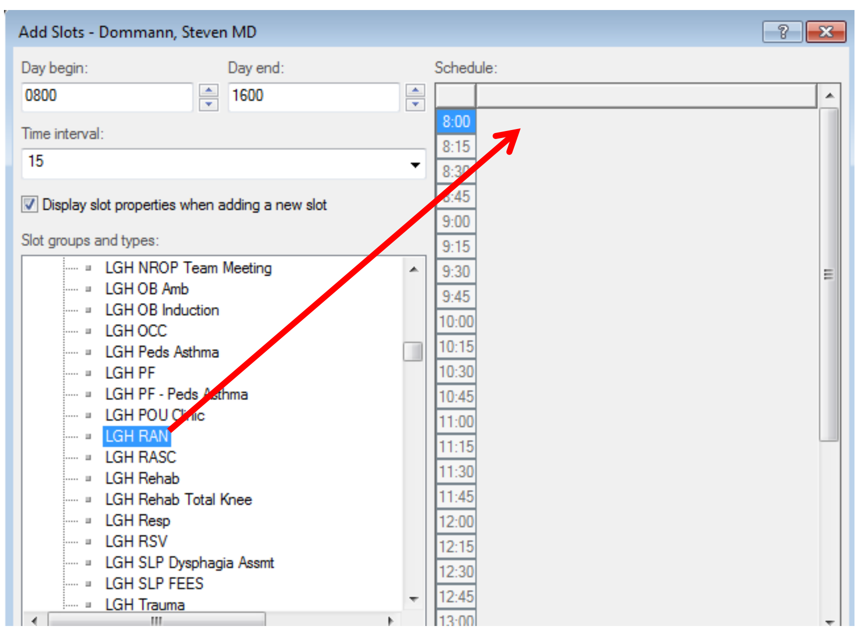
Slot Maintenance

Adding Slots for a Day

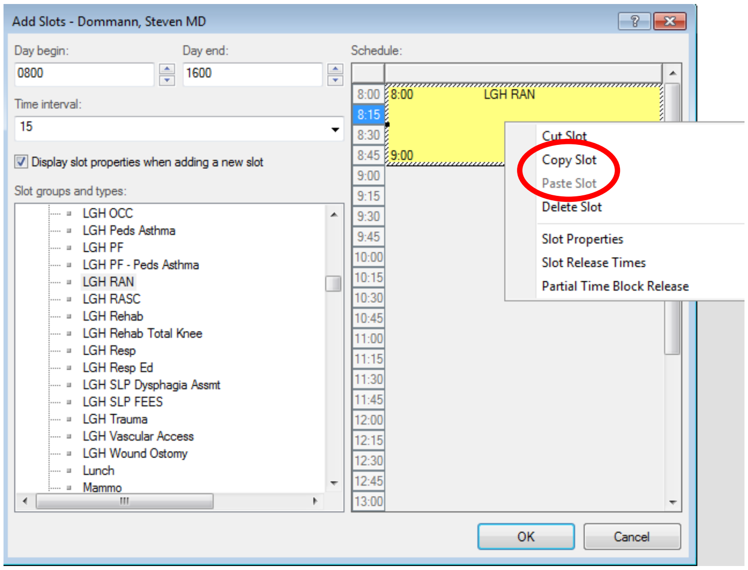
1. Right-click on the scheduling appointment grid, select **Slots** then **Add Slots**.
2. Change the time interval of the slots on the right if necessary.
3. Open the **+** sign next to the All Slot Types.



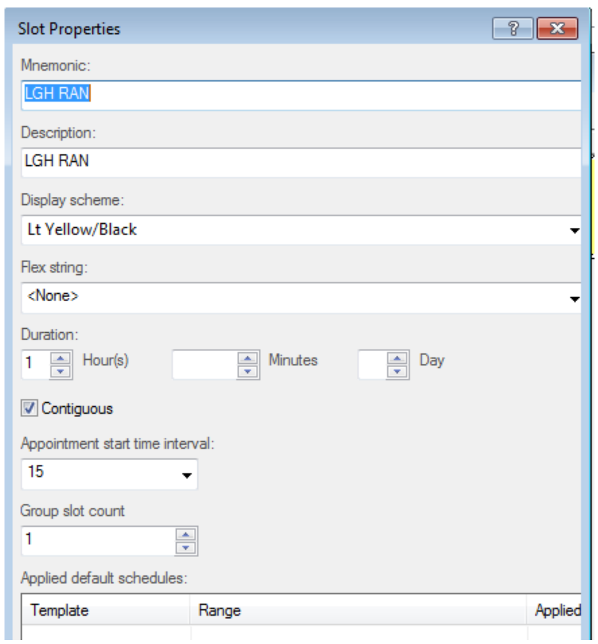
4. Find the appropriate slot type and select for your clinic.
5. Drag and drop the selected slot type to the appropriate start time on the right side of the screen.



6. If more than one slot of the same type is required, you can right-click; select copy and then paste the slot into the desired time slot.



7. To change the duration or description of the slot right-click and select **Slot Properties**.

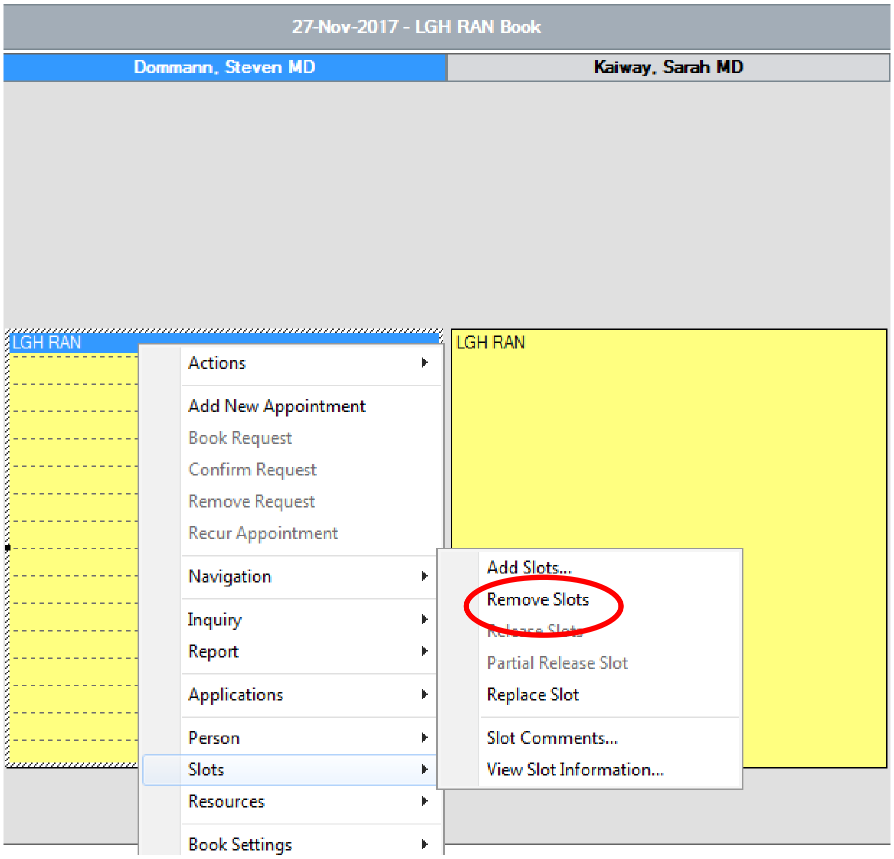


8. Change the slot information and click **OK**. The information typed into the mnemonic field will display on the appointment screen.
9. Click **OK** on the "Add Slots" window to save the changes to the new slot.

NOTE: It is not possible to modify a slot after it is created. You must use the "Remove Slots," "Add Slots," or the "Replace Slots" function to make any changes to the slot.

Removing Slots from a Schedule

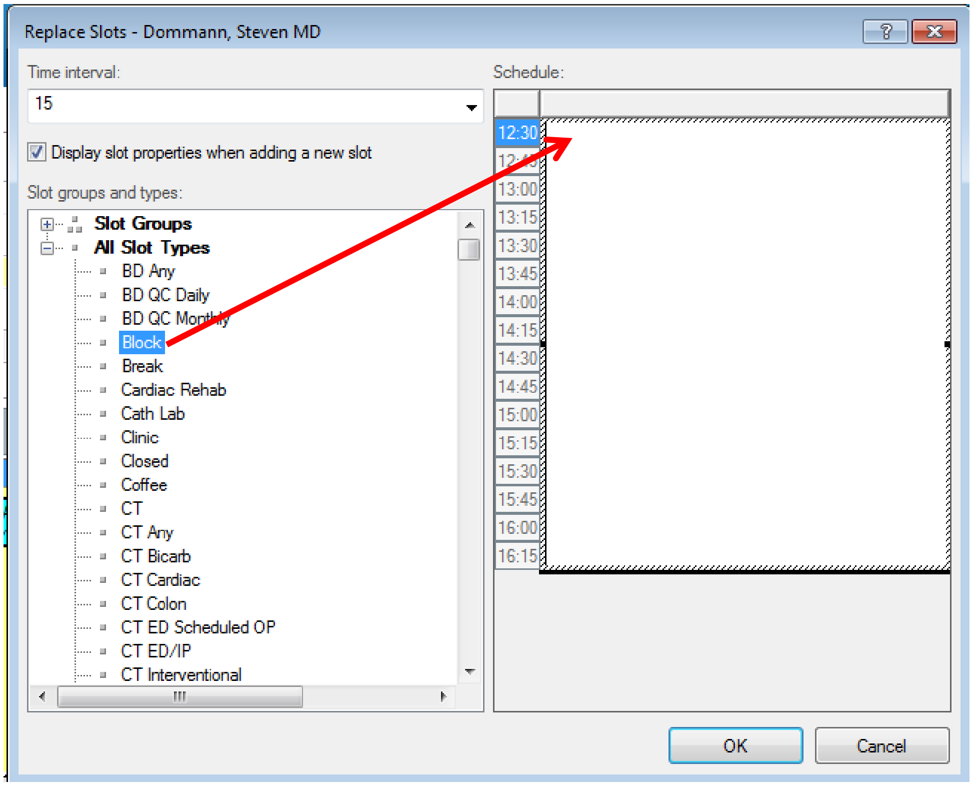
1. Right-click on the slot to be removed.
2. Select **Slots** then **Remove Slots**.



3. A confirmation window will appear. Click **Yes** to remove the slot.

Replacing Slots from a Schedule

1. Right-click on the slot to be replaced.
2. Select **Slots** then **Replace Slot**.
3. Open the + sign next to the All Slot Types.
4. Find the slot type that the current slot will be replaced with.
5. Drag and drop the selected slot type to the start time on the right side of the screen.



6. Follow steps (7 to 9) from Adding a Slot to complete replacing the slot.

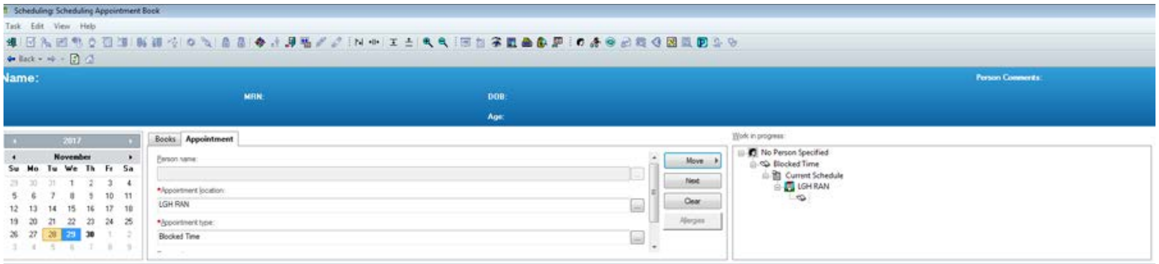
NOTE: When replacing slots, the new slot(s) must be the same duration as the original slot. (It is possible to add multiple slots of different types and durations to fill up the time block).

Blocking Schedules

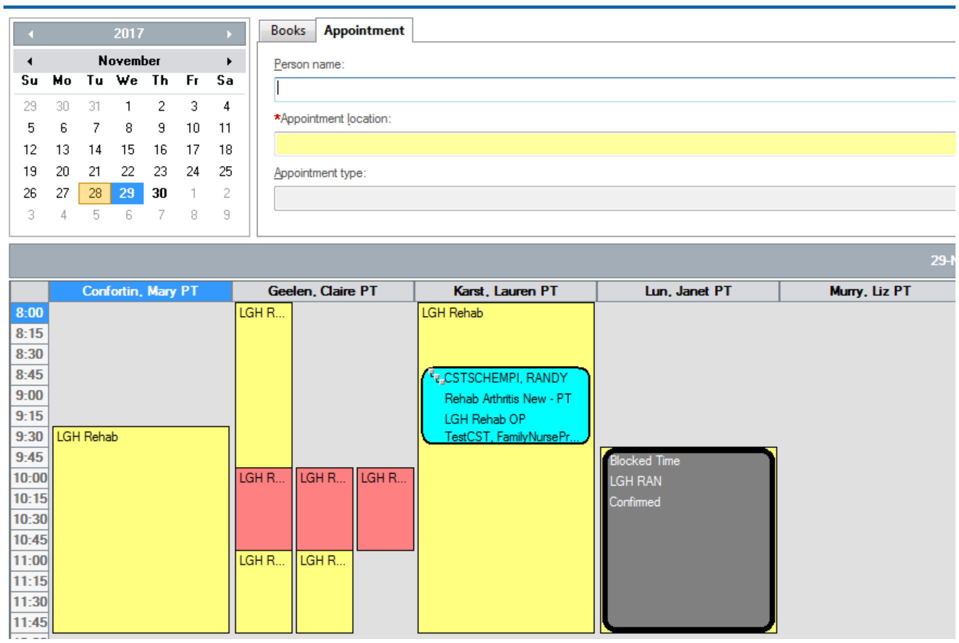
There are times when you will need to block off a schedule so that appointments are not booked inti it.

To block just a few slots, you can use the appointment type "Blocked Time." When you have confirmed it, the slot will turn grey and cannot be scheduled into.

1. Follow the steps (1 to 4) from Pre-requisite Steps for Booking an Appointment to go to the Appointment tab.
2. Select an Appointment Location from the drop down list (**NOTE**: Skip the Person Name field).
3. Select "Blocked Time" in the Appointment Type field.
4. Add any appropriate comments in the Comments field in the "Accept Format Fields."
5. Click on the **Move** button to move the appointment to Work in Progress (WIP) area.



6. Use either "Drag & Drop" or "Schedule" button option to block the time on calendar.
7. Click **Confirm** to complete booking the Blocked Time appointment.



Appointment Management

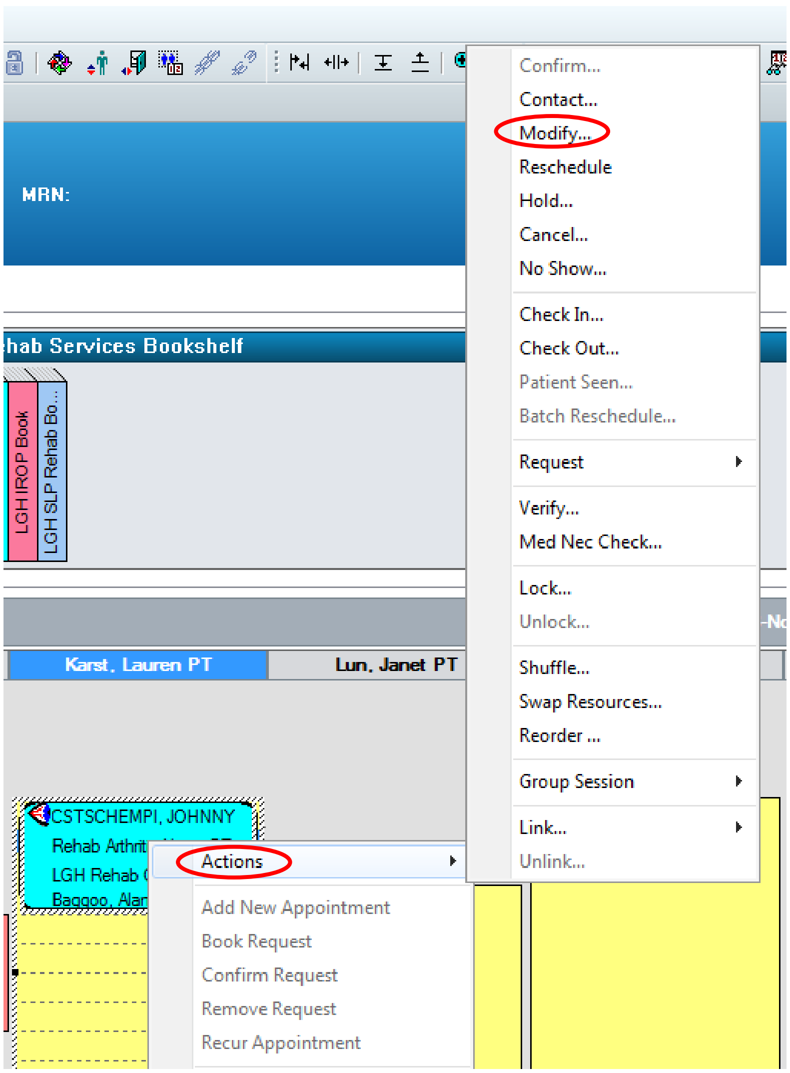
Modifying Information

There are two different types of modifications that can be made. You can modify Appointment information such as the Referring Provider, Referral Received Date, Reason for Visit, and Special Instructions, etc. You can also modify Patient information such as their Date of Birth, Last Name, and Phone Number, etc.

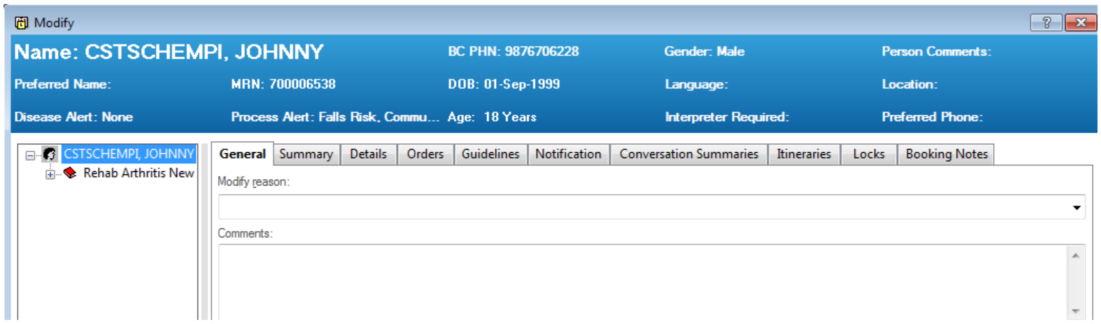
NOTE: Do not use these steps if you have a preference card associated with the appointment.

Appointment information can be modified in two ways.

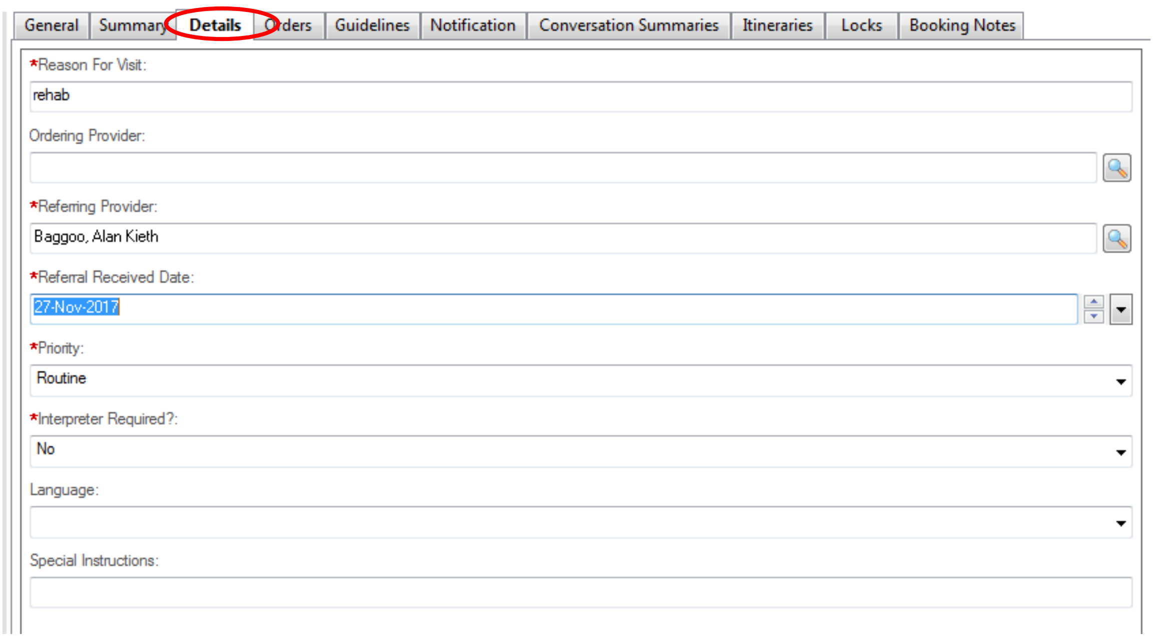
1. First, you can right click on the appointment, go to **Actions**, and then select **Modify**.



2. You can also highlight the appointment, and then click the **Modify** button  at the top of your screen.
3. The “Modify” window will pop up allowing you to make any changes.

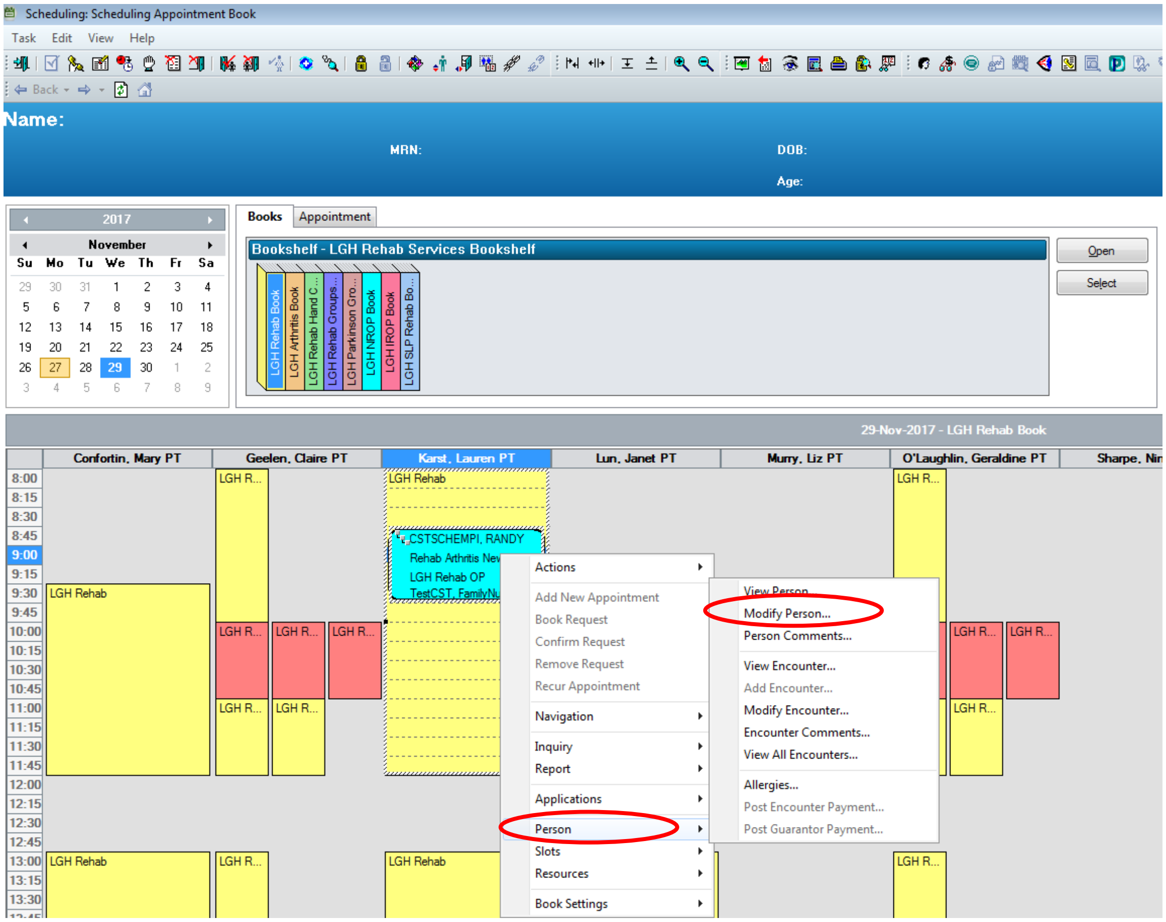


4. Click the **Details** tab to make changes to the appointment information.

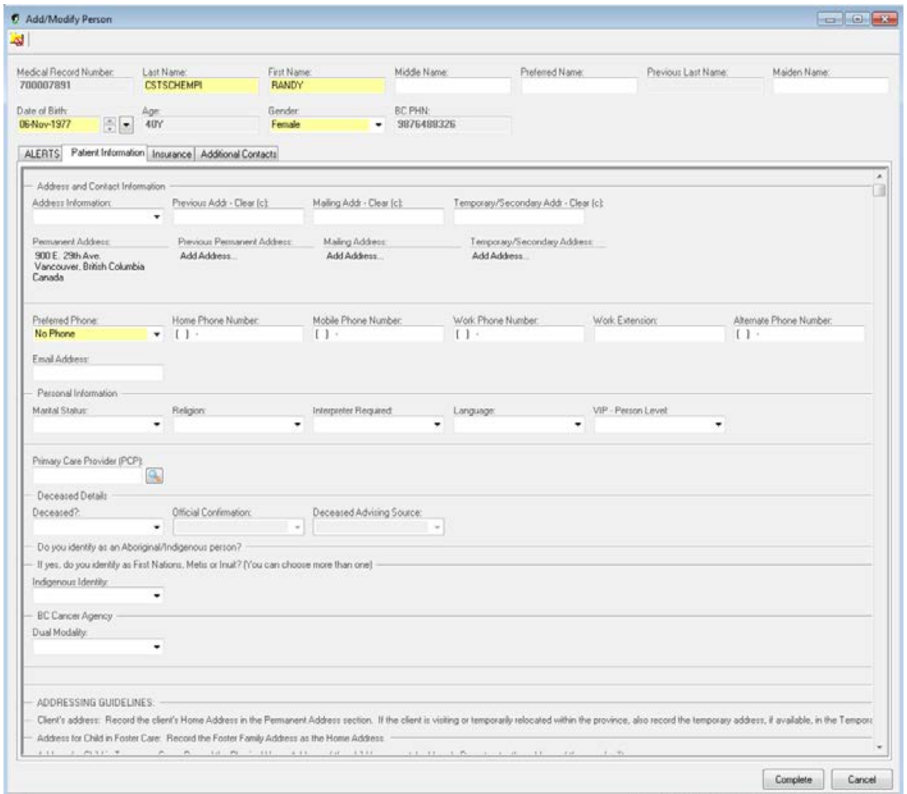


NOTE: It is not possible to modify the Appointment Type, Location, Patient Name. These changes will require the apppointment to be rescheduled.

5. You can type in any additions you need or delete information, then click **OK** to save.
6. To modify patient information, you will need to highlight that person’s appointment, right click, go to **Person**, and select **Modify Person**.



7. Select Facility Name in the “Organization” window. The EMPI window briefly launches.
8. On your screen you will see the system loading patient information, and opening the Modify conversation. When the “Add Person” window opens, you can make any changes that are required.



9. After you have made your changes, click **Complete** to save.

Appointment Cancellation

There are multiple options for canceling appointments:

Option 1: Right-click on the appointment within an **Appointment Inquiry**.

Option 2: Right-click on the appointment within the scheduling grid area.

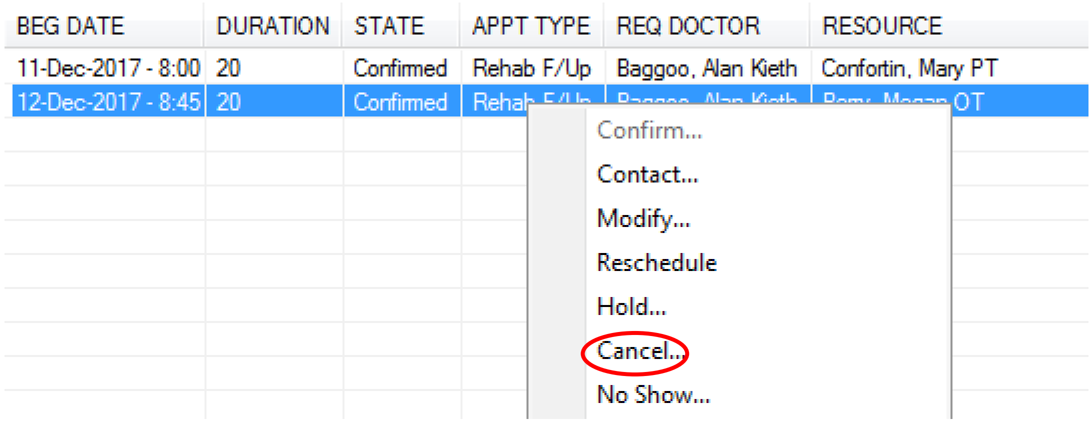
Option 3: Click on the **Cancel** icon on the Toolbar. 

Option 1: Right-click on the appointment within the Appointment Inquiry

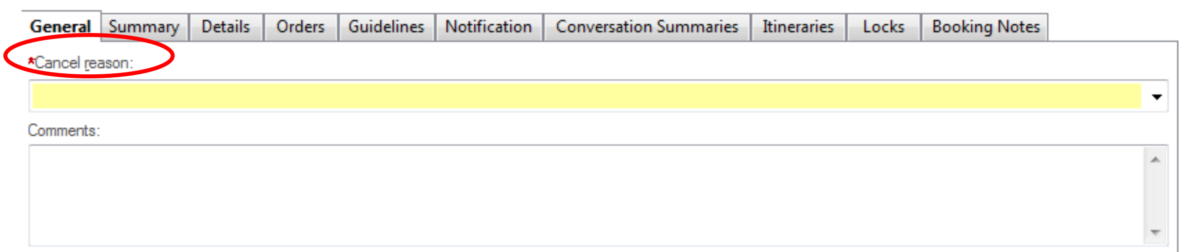
1. To cancel an appointment from an Inquiry, first open the **Schedule Inquiry** window by clicking on the eyeball icon in the Toolbar. 
2. Use one of the many available Inquiries to find the appointment:
   - Search by the patient name using a **Person Inquiry** such as “Person Schedule Inquiry – Standard”

- Search for the appointment by the Resource name using a **Resource Inquiry** such as “Resource Schedule Inquiry – Standard”
- Search for the appointment by the appointment’s scheduled location using a **Location Inquiry** such as “Location w/Person Name”

3. Select the Inquiry type of your choice, fill out the appropriate search criteria and press the **FIND** button.
4. Highlight the appointment you wish to cancel, right click and choose **Cancel**.



5. If the “Interpreter Required?” field was set to “Yes” when the appointment was scheduled, an Appointment Guideline will appear reminding the clerk to cancel the interpreter request.
6. The Cancellation window will display. Select an appropriate reason in the **Cancel Reason** dropdown and press the **OK** button.

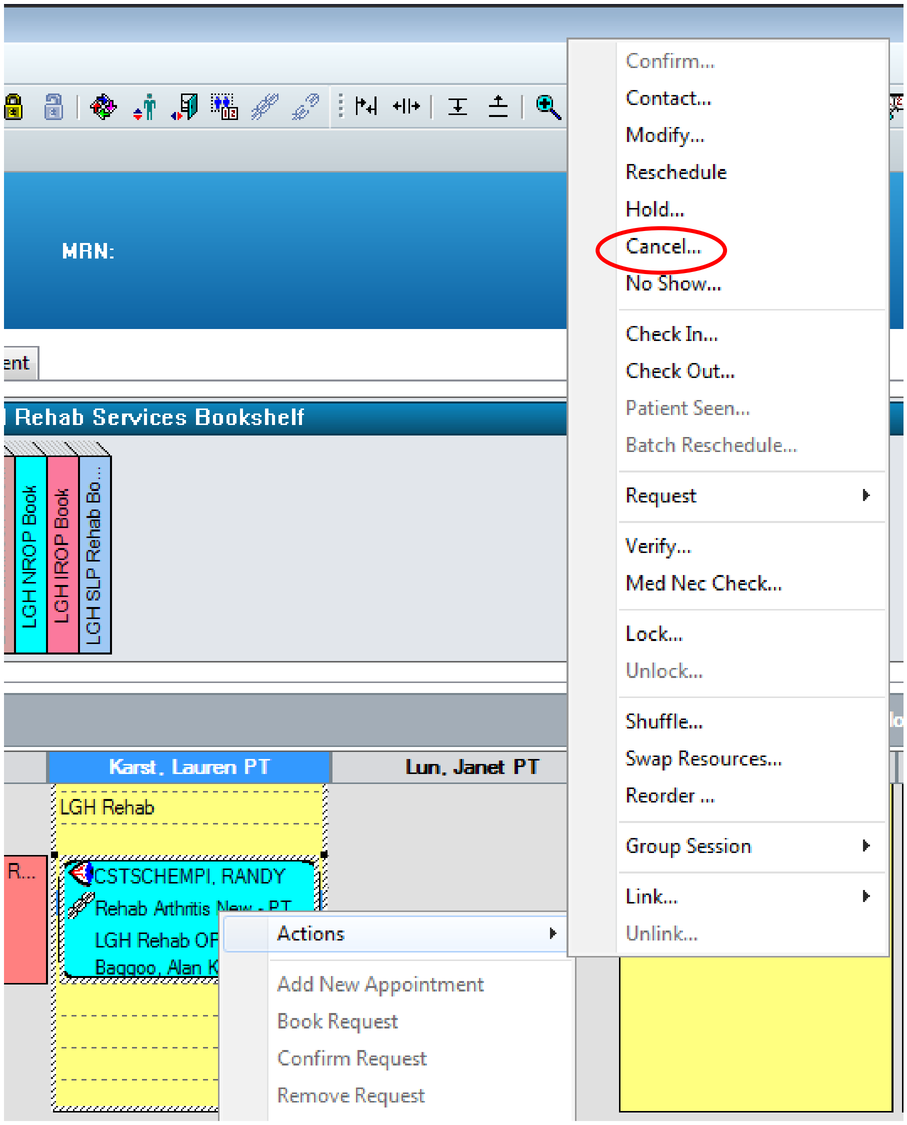


7. The appointment is now in a cancelled state. If there is an order associated to the appointment, the order will get auto-cancelled.
8. The next step is to Cancel or Discharge the encounter which is covered in Registration’s Foundation training.

   NOTE: Cancel the encounter if there are no orders/documents associated with it and discharge the encounter if there are orders /documents associated with it.

Option 2: Right click on the appointment within the scheduling grid area

1. You may also cancel appointments directly within the grid area. To accomplish this, right click on the appointment; go to **Actions**, then **Cancel**.



2. The Cancellation window will display. Follow the steps (4 to 6) from Appointment Cancellation Option 1 to complete cancelling an appointment.

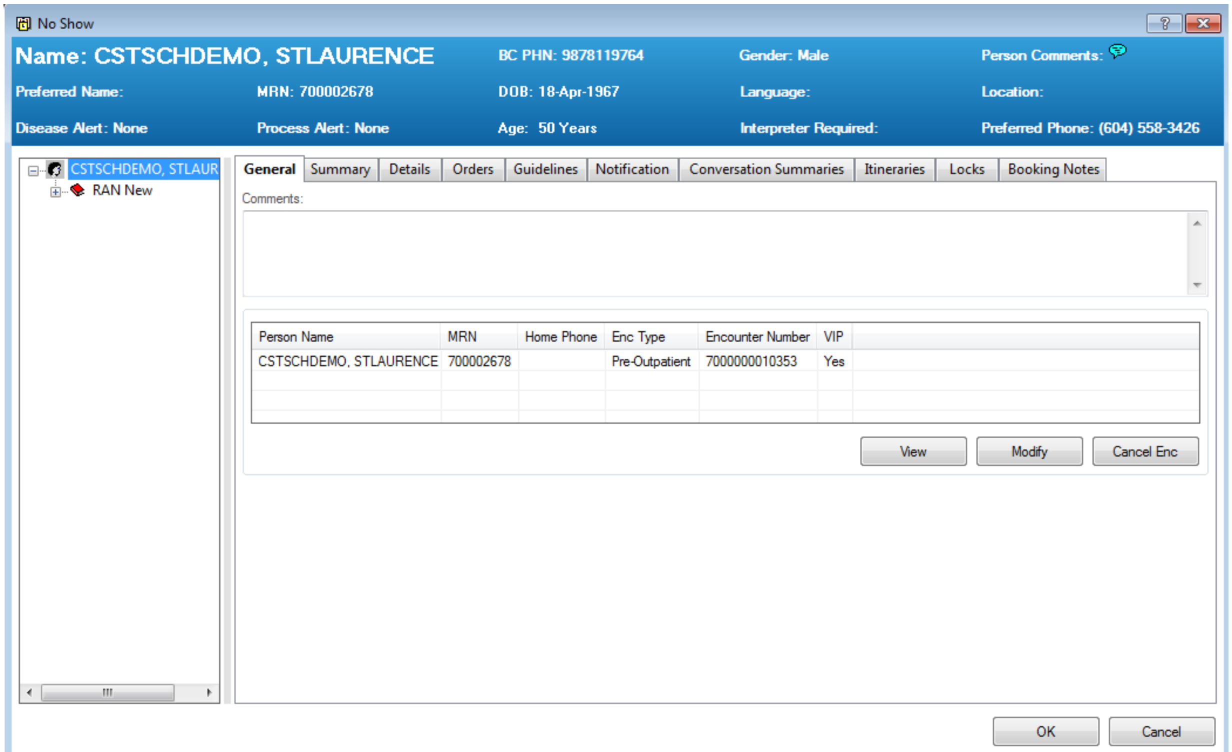
Option 3: Click on the Cancel icon on the toolbar

1. Again, highlight the appointment you want to cancel, and then click the **Cancel Icon**  at the top of your screen.
2. The "Cancellation" window will display the same as in the previous methods of appointment cancellation.

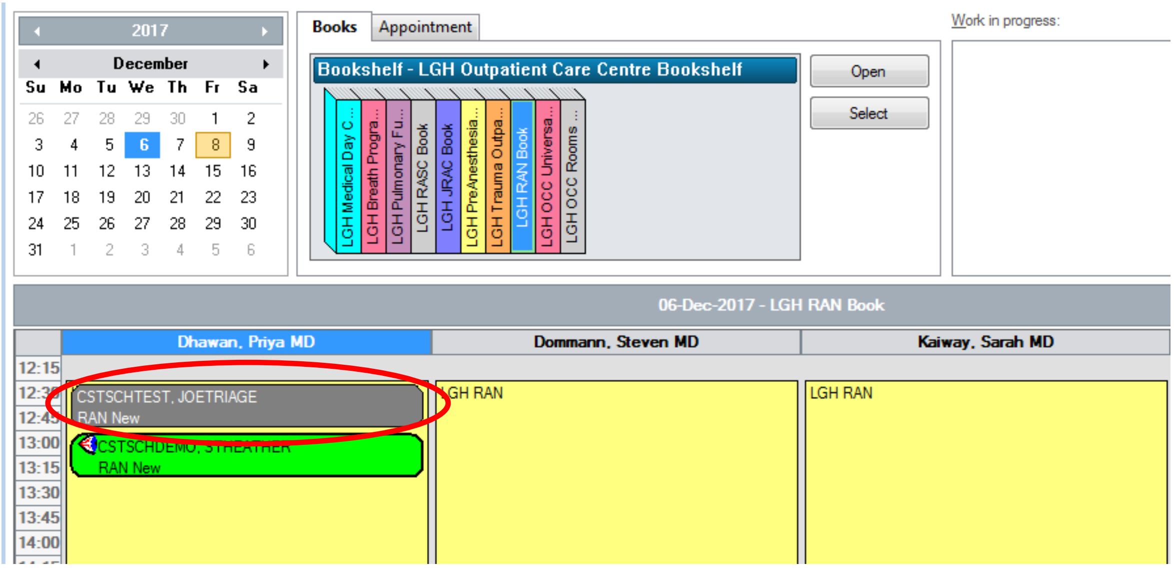
Appointment No Show

If a patient does not show up for their scheduled appointment, the appointment should be “No Showed” (the guidelines around No Showing may differ by clinic). This action will change the status of the appointment to “No Show.” It will also create a reschedule request so the appointment can easily be moved to another date/time (if appropriate). Follow the steps below to “No Show” an appointment.

1. From the Scheduling Grid or an Inquiry, right-click on the appointment, go to **Actions**, then **No Show**. The No Show window will open.

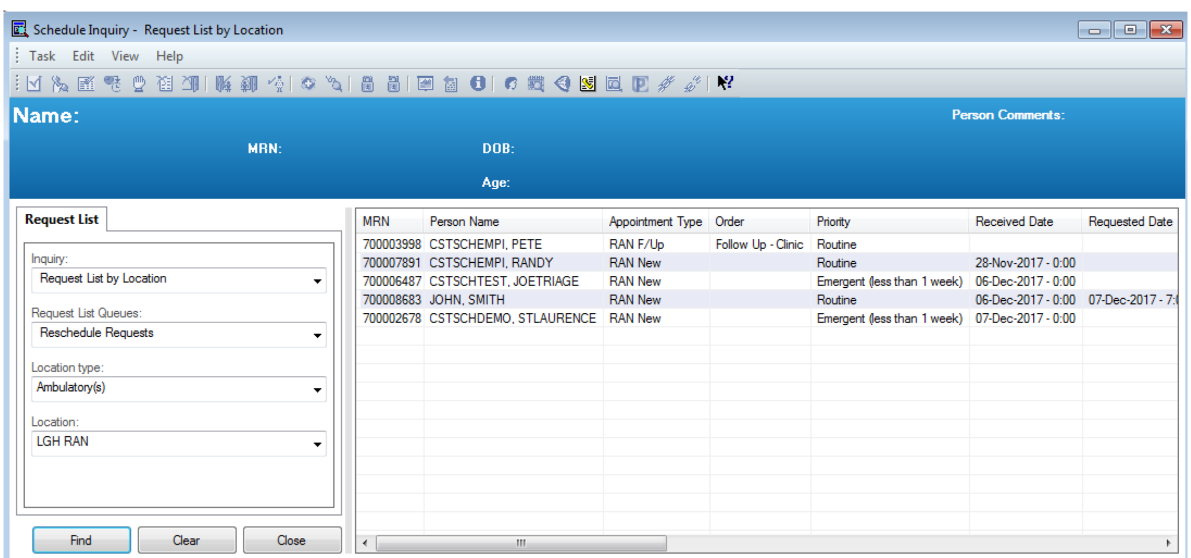


2. Verify you have selected the correct patient/appointment and click the **OK** button.
3. The appointment will appear as No Showed (grey) in the Scheduling Grid.



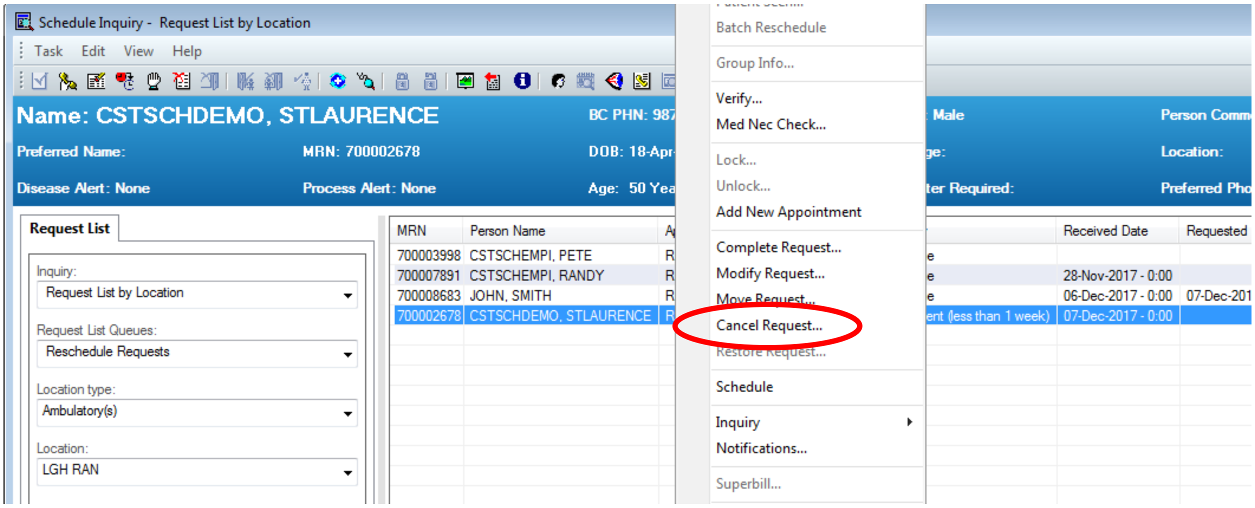
A Reschedule Request is automatically generated when an appointment is "No Showed." Open the "Reschedule Requests" Request List to view and manage the request.

4. Click on the **Request List Inquiry** icon. 
5. In the "Schedule Inquiry" window, the Inquiry should be "Request List by Location." From the "Request List Queues" dropdown, select "Reschedule Requests."
6. Enter the appropriate **Location Type** (i.e. Ambulatory) and **Location** (i.e. LGH RAN) and click the **Find** button. All appointment requests that meet the search criteria are displayed.

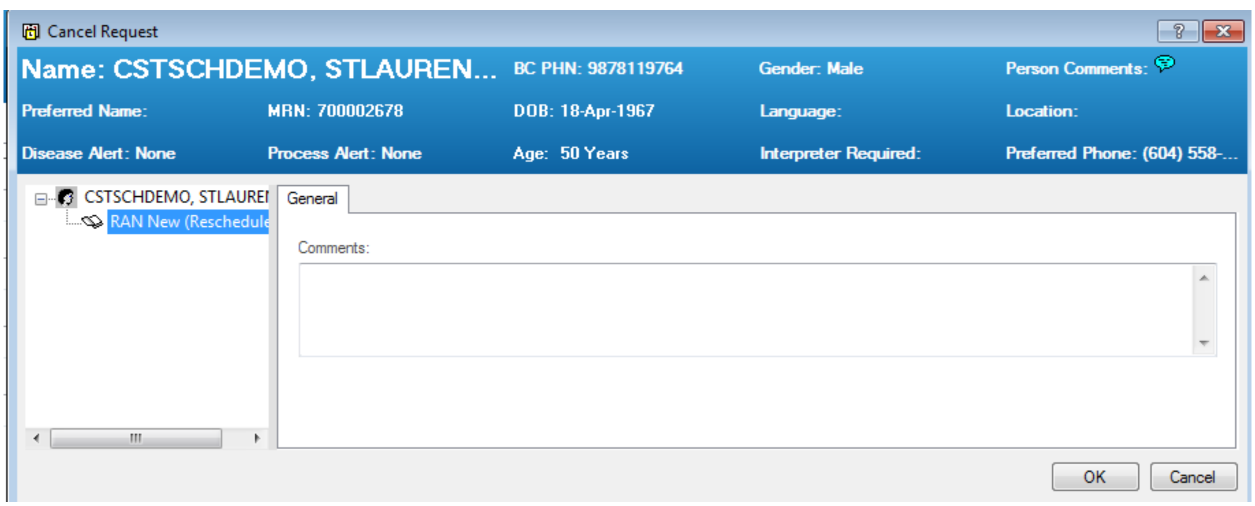


7. If the appointment is not going to be rescheduled, follow these steps:
    a. Right-click on the patient and select **Cancel Request.**

NOTE: It is important you select "**Cancel Request**" and not "**Cancel**".

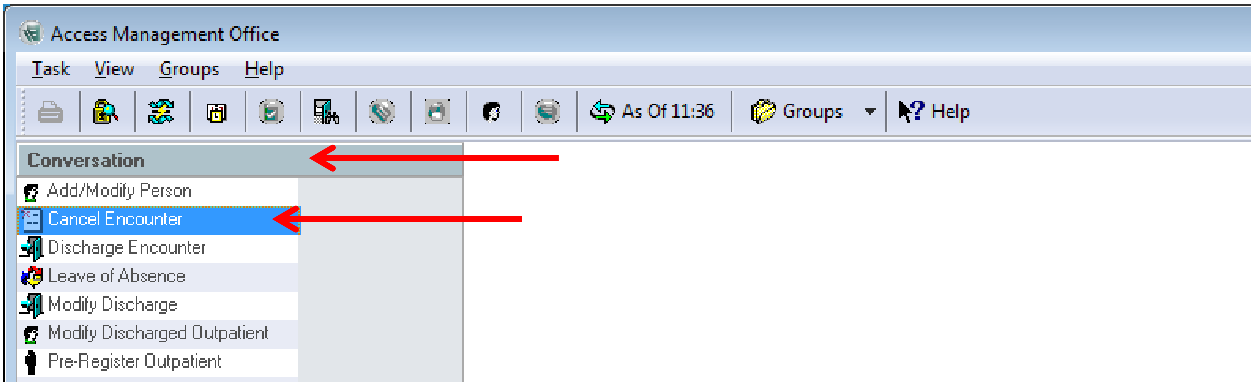


b. A "Cancel Request" window will open. Enter comments into the Comments field if necessary and click **OK**. The patient will fall off the list.



c. Log into **PMOffice** to cancel the Pre-Outpatient encounter.

d. Click on the **Conversation** tab and double-click on the **Cancel Encounter** conversation.

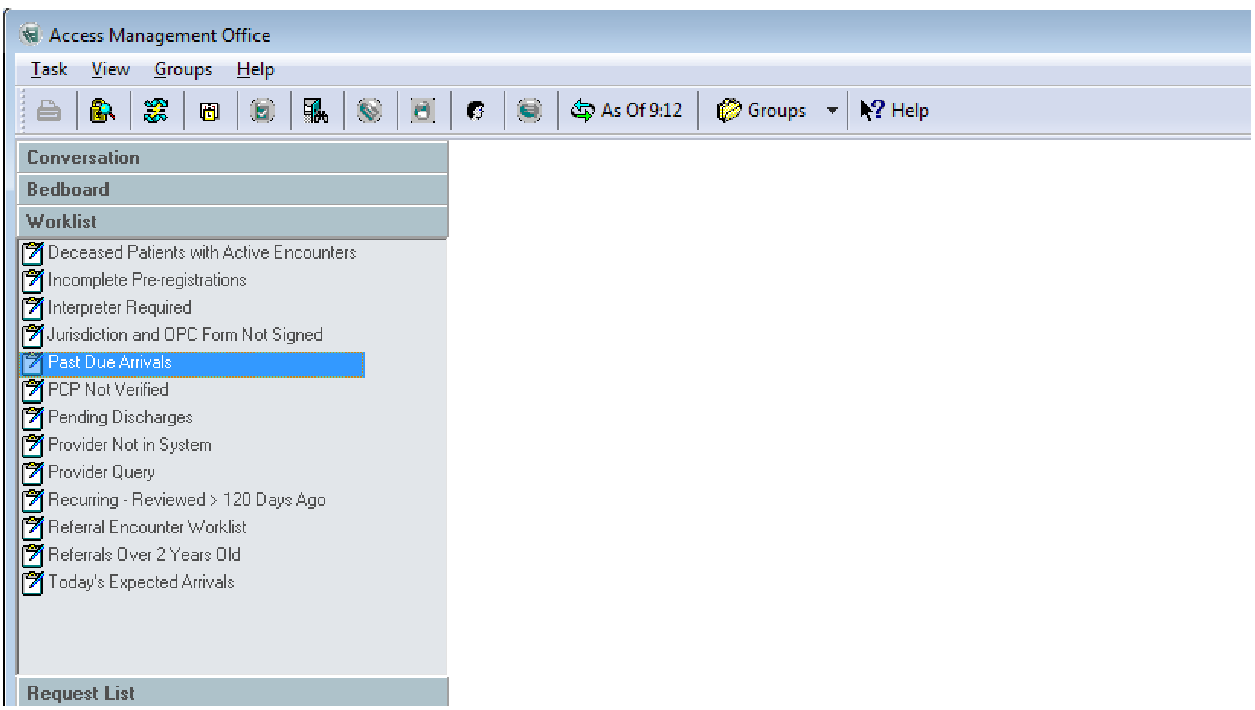


e. Refer to the Person Search Quick Reference Guide to find the appropriate patient.

f. Be careful to select the appropriate Pre-Outpatient encounter and click **OK**.

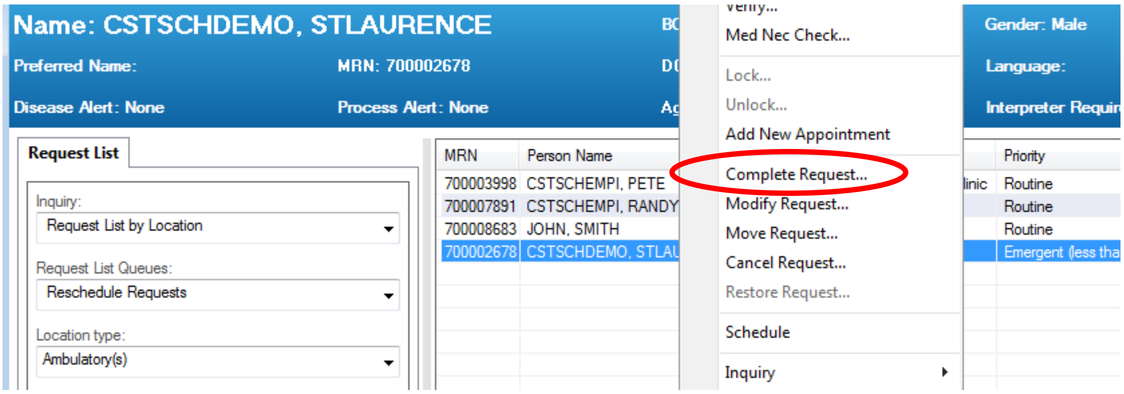
g. The Cancel Encounter window will open. Confirm you have selected the appropriate patient and encounter then click **Complete**.

NOTE: If you are cancelling the encounter the same day as the appointment, you can use "Today's Expected Arrivals" worklist to find the patient/encounter. If you do not cancel the encounter, it will appear on the "Past Due Arrivals" worklist.



8. If the appointment should be rescheduled, follow these steps:

   a. Right-click on the patient and select **Complete Request…**



a. Click **OK** if the "Future Requests/Appointments" window opens.

b. In the "Existing Encounter" window, click **Yes** to retain the associated encounter.

c. The appointment will appear in the WIP. Refer to the steps 7-10 in the Appointment Reschedule section (Option 1) to complete the rescheduling of the appointment.

NOTE: The attached encounter will be updated with the new date and time.

Appointment Reschedule

There are multiple methods for rescheduling an appointment.

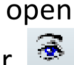
Option 1: Right-click on the appointment within an Appointment Inquiry

Option 2: Right-click on the appointment within the Scheduling Grid area

Option 3: Click on the **Reschedule** icon on the Toolbar

Option 4: Drag-and-Drop into WIP

Option 1: Right-click on the appointment within an Appointment Inquiry

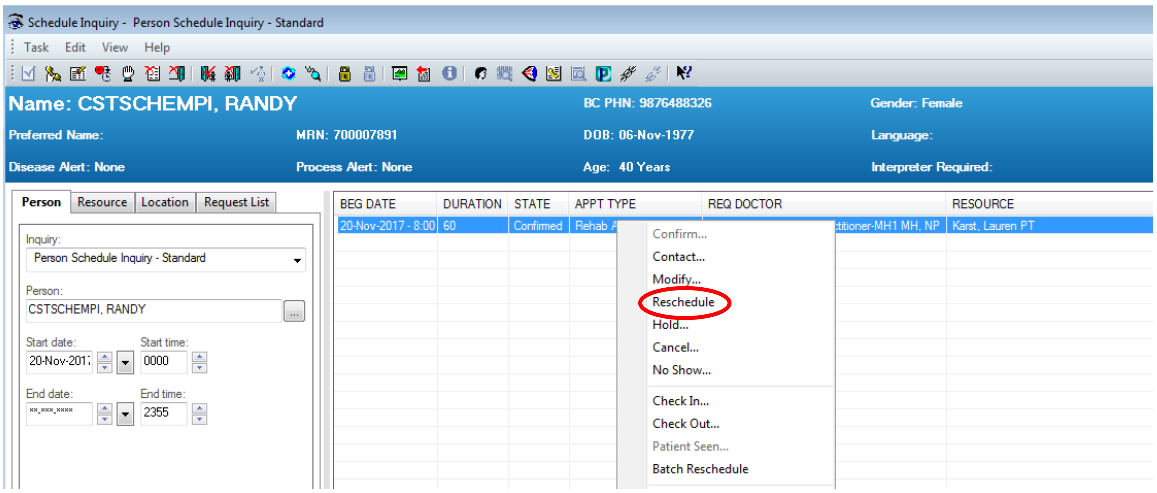
1. To reschedule an appointment from an Inquiry, first open the "**Schedule Inquiry"** window by clicking on the eyeball icon in the Toolbar. 

2. Use one of the many available Inquiries to find the appointment:

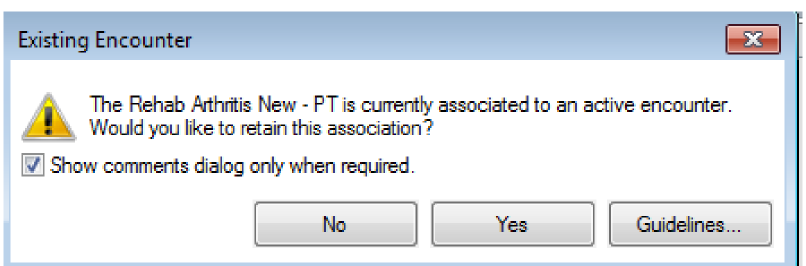
   - Search by the patient name using a **Person Inquiry** such as "Person Schedule Inquiry – Standard"

- Search for the appointment by the Resource name using a **Resource Inquiry** such as "Resource Schedule Inquiry – Standard"
- Search for the appointment by the appointment's scheduled location using a **Location Inquiry** such as "Location w/Person Name"

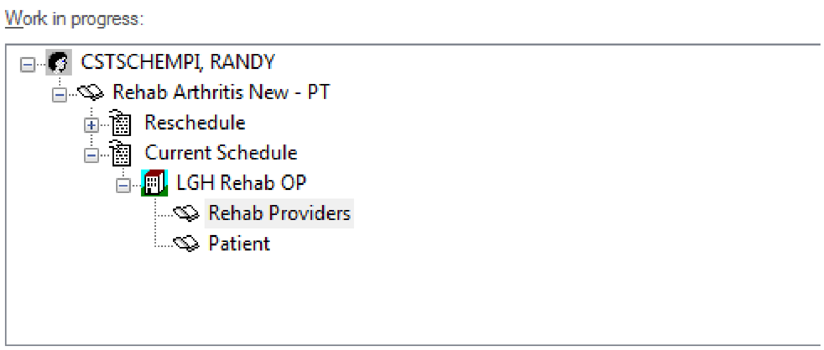
3. Select the Inquiry type of your choice, fill out the appropriate search criteria and press the **FIND** button.
4. Highlight the appointment you wish to reschedule right click and choose **Reschedule**.



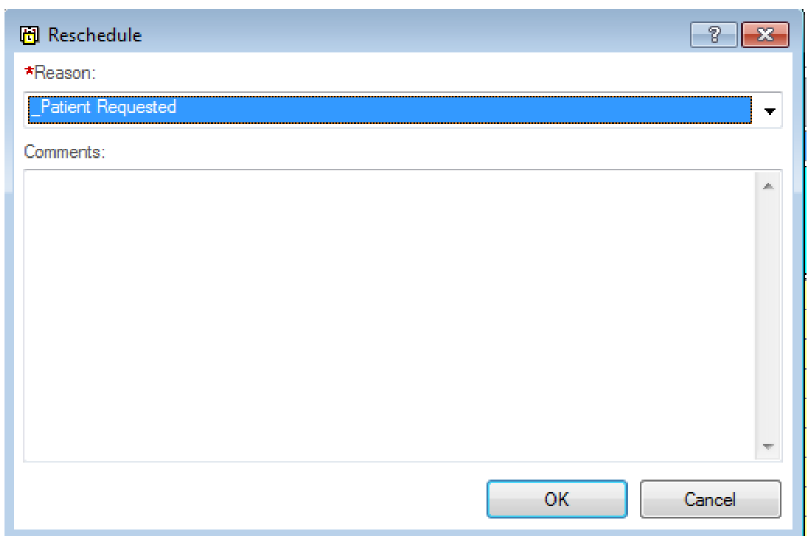
5. The "Future Requests/Appointments" window may display. Press **OK** to move to the next step.
6. The Existing Encounter warning may display if your appointment currently has an active encounter associated. Press the **YES** button to retain the encounter association.



7. If the "Interpreter Required?" field was set to "Yes" when the appointment was scheduled, an Appointment Guideline will appear reminding the clerk to reschedule the interpreter.
8. If there is an order associated to your appointment, the Appointment Attributes window will display. Press the **OK** button within this window.
9. The appointment information will now display within the WIP.



10. From this point, you will find a new available appointment time using one of the methods previously described (reference: Drag and Drop Method, Suggest Scheduling Method or Schedule Button Method). Find a new appointment time and press the **Confirm** button. The “Confirmation” window will display. Press the **OK** button.
11. The **Reason** in “Reschedule” window will display. Select a reason from the dropdown and press the **OK** button.

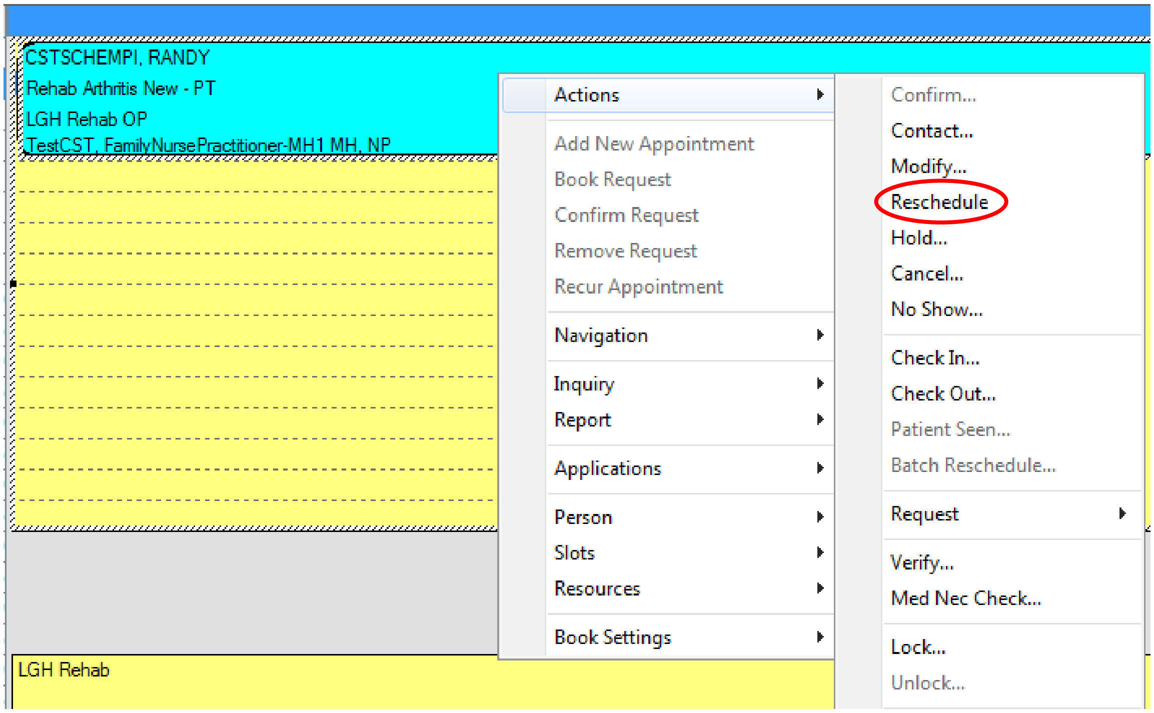


12. Your appointment will now appear in a Confirmed status in the new appointment time.

    NOTE: the attached encounter will be updated with the new date and time.

Option 2: Right click on the appointment within the scheduling grid area

1. You may also reschedule appointments directly within the grid area. To accomplish this, right click on the appointment, go to **Actions**, and then click on **Reschedule**.



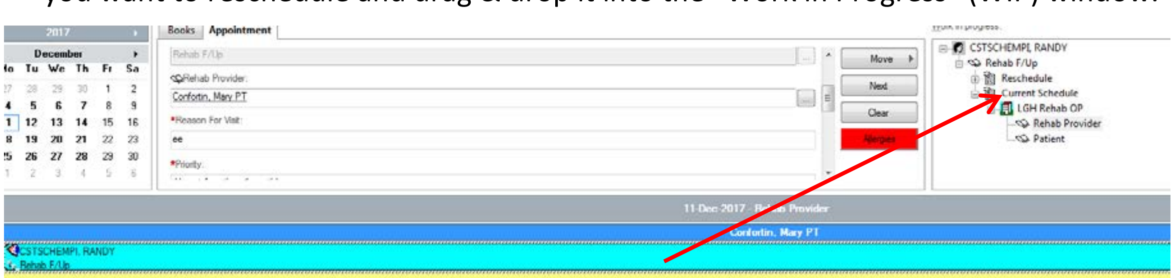
2. From the WIP, continue to reschedule the appointment following the same steps as Option 1 (refer to steps 5-10).

Option 3: Click on the Reschedule icon on the Toolbar

1. Another method for Rescheduling appointments is to use the **Reschedule** icon
2. Again, highlight the appointment you want to reschedule, and then click the **Reschedule** icon at the top of your screen. 
3. From the WIP, continue to reschedule the appointment following the same steps as Option 1 (refer to steps 5-10).

Option 4: Drag-and-Drop into WIP

1. To reschedule an appointment using Drag & Drop into the WIP, select the appointment you want to reschedule and drag & drop it into the "Work in Progress" (WIP) window.

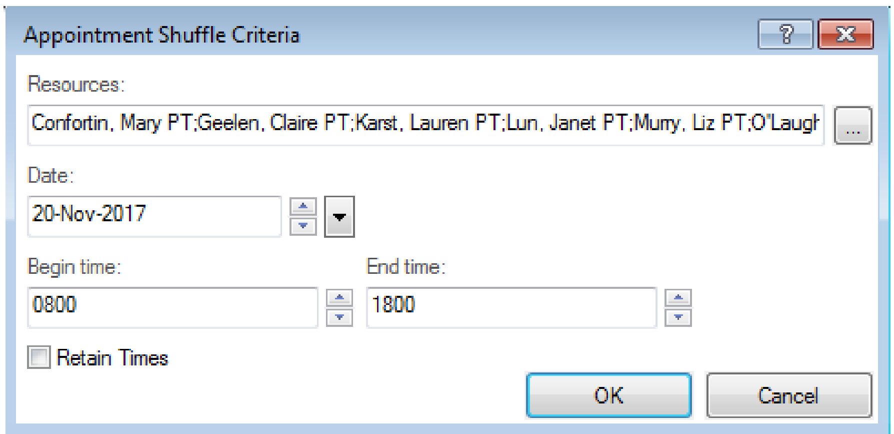


2. From the WIP, continue to reschedule the appointment following the same steps as Option 1 (refer to steps 5-10).

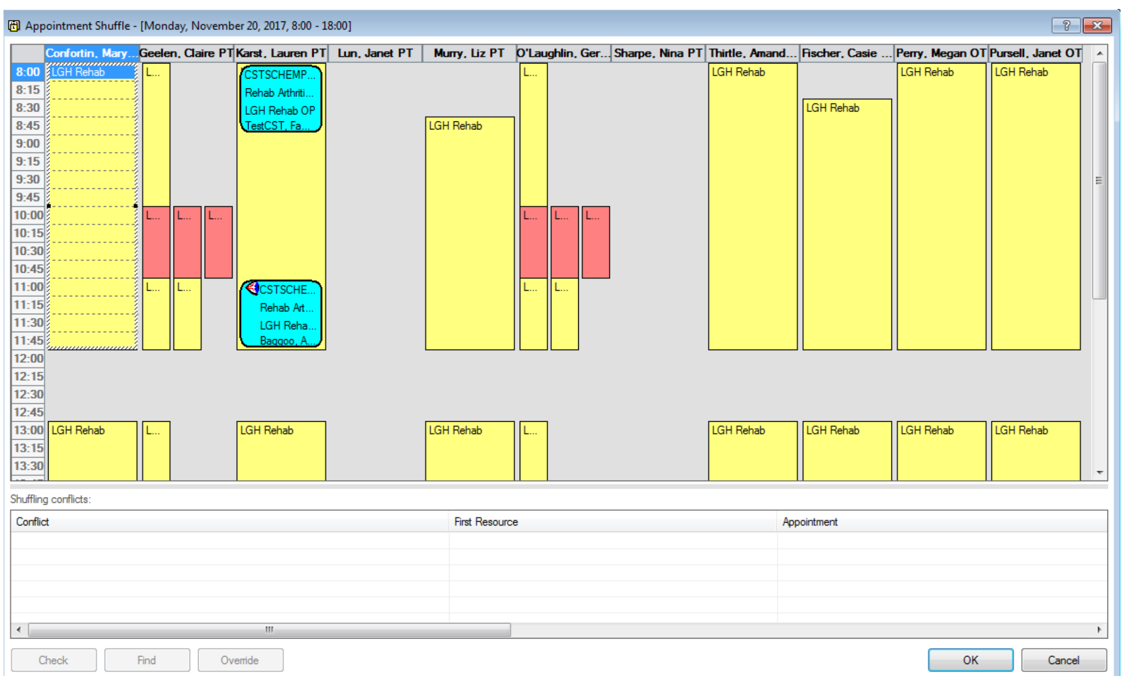
Appointment Shuffle

The shuffling feature is used to move around appointments **on the same day**, without having to go through all of the rescheduling steps. For example, if appointments are scheduled for a particular examination room, and that room is no longer available, you can display the “Appointment Shuffle” window and drag the appointments from the unavailable resource to the available resource.

1. Select the **Shuffle** option in the Appointment Book to open the “Appointment Shuffle Criteria” window. You may also highlight an appointment within the grid area, right click, choose **Actions**, and then **Shuffle** from the menu.
2. The “**Appointment Shuffle Criteria”** window will display. Press the **OK** button.

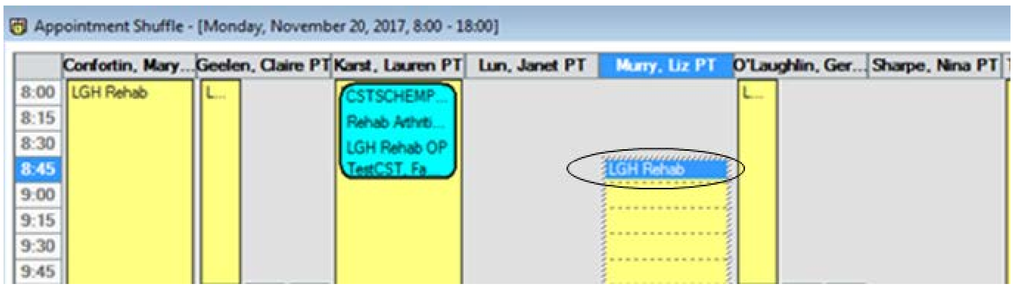


3. The “Appointment Shuffle” window will display.

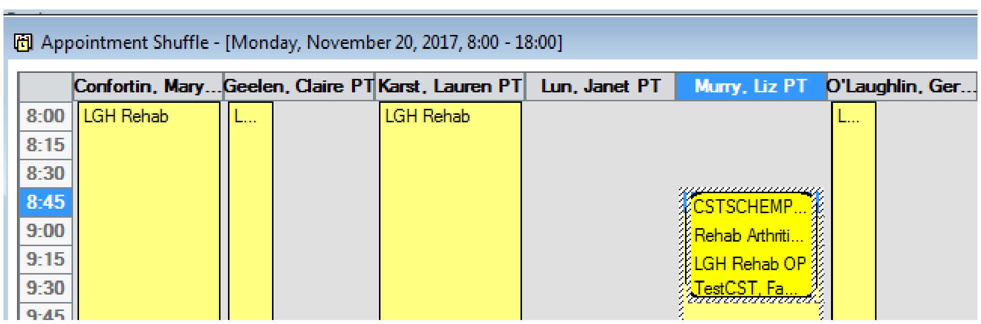


3. To move appointments to a different time or Resource, highlight the appointment you would like to shuffle. You are only able to shuffle appointments from the primary resource to which they are scheduled. It is also important to note that appointments can only be shuffled to a new slot or resource on the same day the original appointment was scheduled.

4. Left click and drag to the new time and Resource. You will see a blue bar display before you release your left mouse click.



5. Release your mouse click and the appointment will now display in the new timeframe in a “Pending” status.



6. Press the **OK** button. The **Reason** for Shuffle window will display. Select a reason from the dropdown and press the **OK** button.

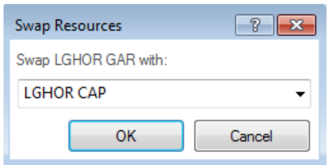
7. The Shuffle window will close and the appointment will now appear in a Confirmed status in the new timeframe/Resource.

Swap Resources

Swap resources is used only to swap all appointments on the same day with another resource in the same appointment book.

1. Select the resource that the appointments are to be swapped from.

2. From the Task menu, select **Swap Resources** icon. The “Swap Resources” window opens.

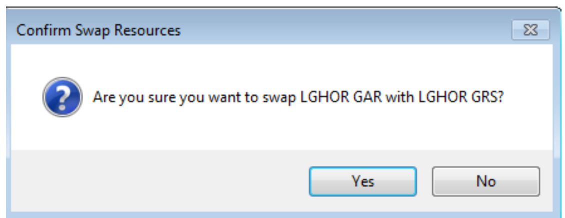


3. From the Swap Resources list, select the resource where you want to move the appointments. The list contains only the resources that you are allowed to access.

   Or, another way to swap resources is by selecting the resource header and "Dragging & Dropping" it into another resource.

4. Click **OK** in the "Confirm Swap Resources" window.

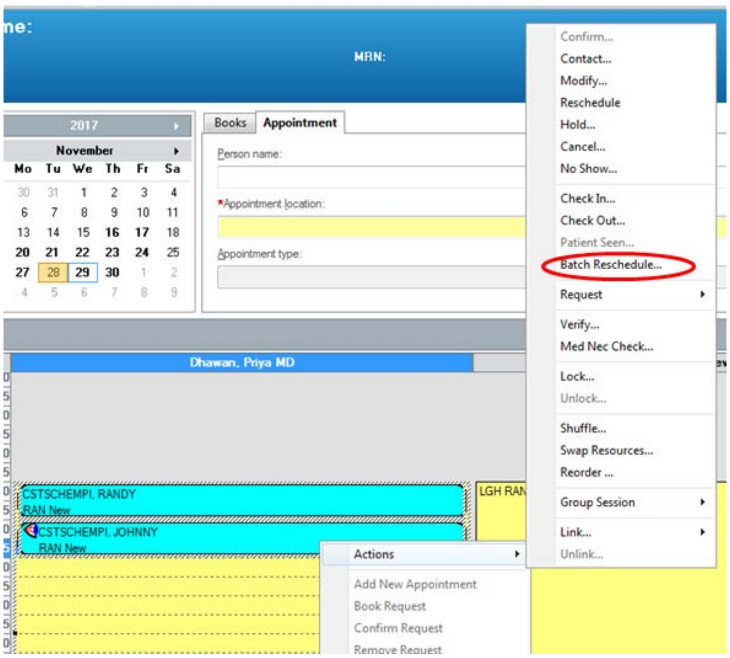
5. You will see the "Confirmation Swap Resources" window. Verify the resources you are swapping are correct, and click on **Yes**.



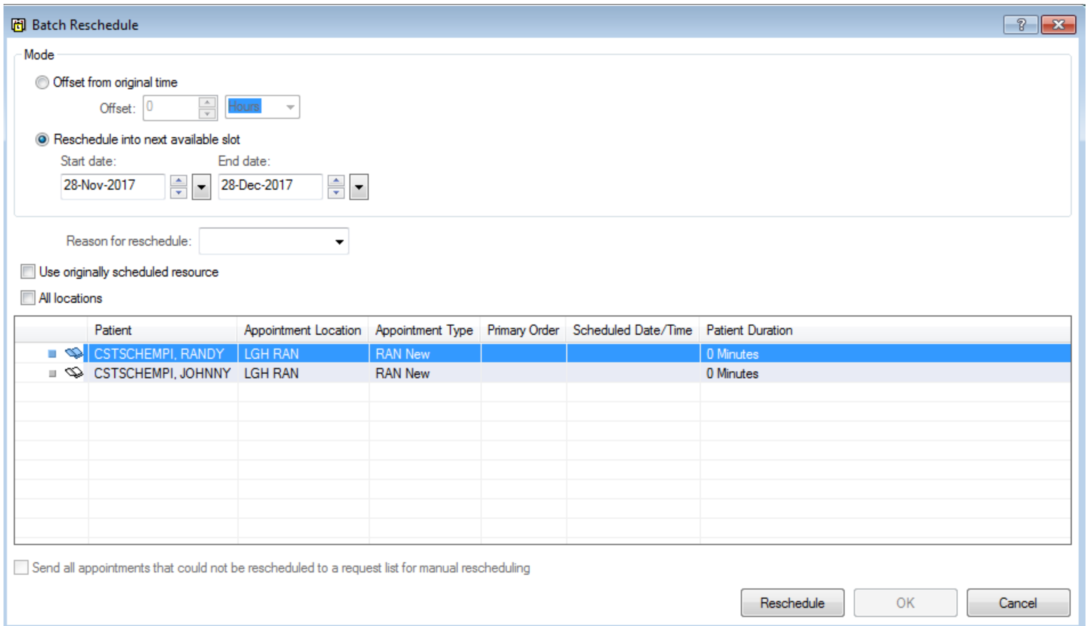
Batch Reschedule

Batch Reschedule simultaneously reschedules multiple appointments while by-passing the Work-In-Progress window. Perform the following steps to reschedule appointments using the Batch Reschedule functionality:

1. Select one or multiple appointments within the appointment grid or appointment inquiry by holding down the **Ctrl** key and highlighting each appointment to be rescheduled.
2. Right-click on the appointments and select **Actions->Batch Reschedule** from the list.

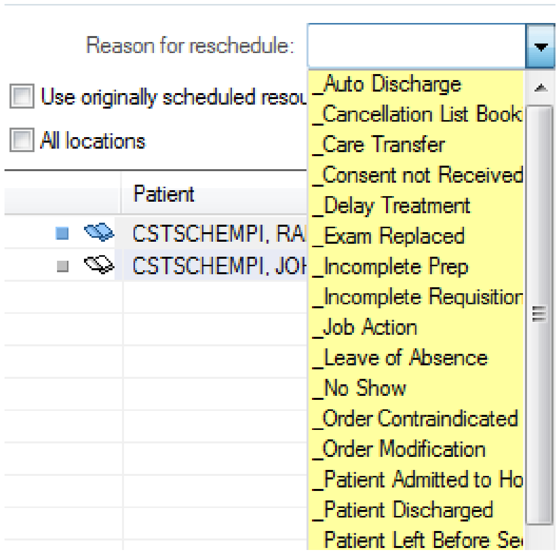


3. The “Batch Reschedule” window opens with all of the appointments selected displayed.

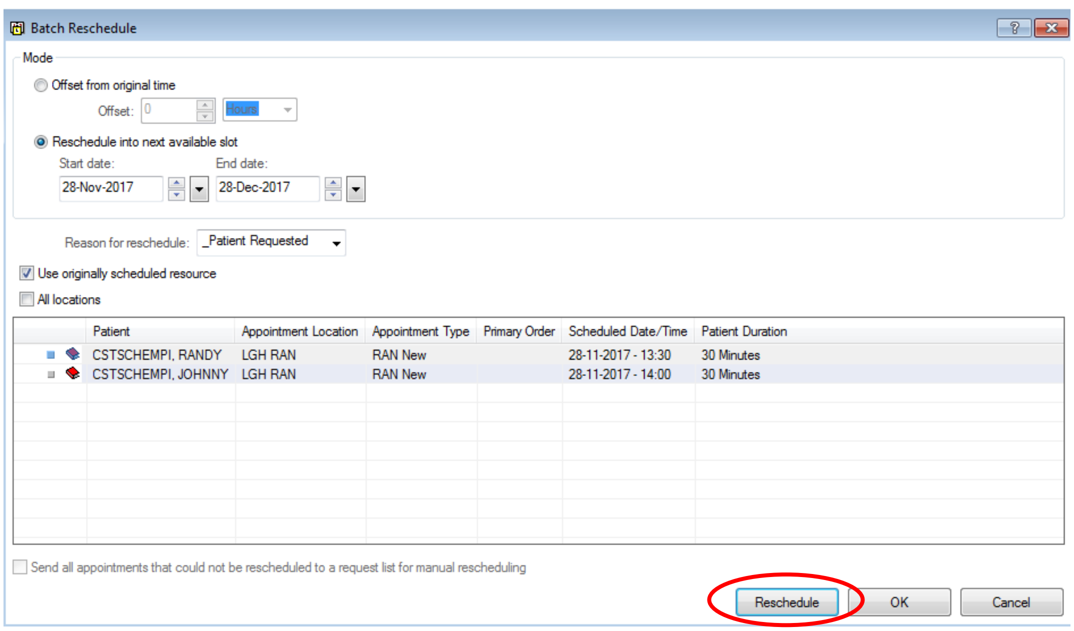


4. Select the appropriate batch reschedule mode and parameters.
   - If “Offset from original time mode” is selected, the offset parameter for rescheduling will need to be specified. For example, an offset of “-1 Hours” will cause all affected appointments to be rescheduled for an hour earlier into the same resource.
   - If “Reschedule into next available slot” mode is selected the begin date and end date range parameter for rescheduling will need to be specified. Additional options of “Use originally scheduled resource” and “All Locations” become available in this mode. If “Use originally scheduled resource” is checked, Batch Reschedule will attempt to reschedule all appointments into the same resources they were originally scheduled for rather than the first available slot across all appropriate resources. If “All Locations” is selected, Batch Reschedule will perform first available rescheduling across all valid locations for the appointment instead of only allowing the originally scheduled location.

5. A reschedule reason is required and will be applied for all appointments currently residing in the “Batch Reschedule” window.



6. Click the **Reschedule** button. The book icon for all appointments that can be rescheduled will close and turn red. The Scheduled Date/Time column will be populated with the newly rescheduled time.



7. If an appointment or appointments cannot be rescheduled using Batch Reschedule, an option to send the appointments to a request list for manual rescheduling appears.

8. Click **OK** to complete the Batch Reschedule action. All appointments previously residing in the Batch Reschedule window are now rescheduled or reside on a request list as a request for reschedule.

   NOTE: The associated encounters are retained with the appointments.

Appointment Check In

Checking-in appointments is a good way to keep track of patients who have shown up for their appointments and those who have not. It's also an easy way for a tech, nurse or other staff members in the department to know which patients have already arrived.

There are multiple options for Checking-In appointments:

Option 1: Right-click on the appointment within an **Appointment Inquiry.**

Option 2: Right click on the appointment within the scheduling grid area.

Option 3: Click on the **Check-In** icon on the Toolbar

Option 1: Right-click on the appointment within an Appointment Inquiry

1. To Check-In an appointment from an Inquiry, first open the "Schedule Inquiry" window by clicking on the eyeball icon in the Toolbar. 
2. Appointments can be checked in from any Inquiry, but the recommended Inquiry is called "Appointment Check-In by Location." Click on the **Location** tab, enter the search criteria below and press the **FIND** button.

    Inquiry: "Appointment Check-In by Location"

    Start date: add a valid start date

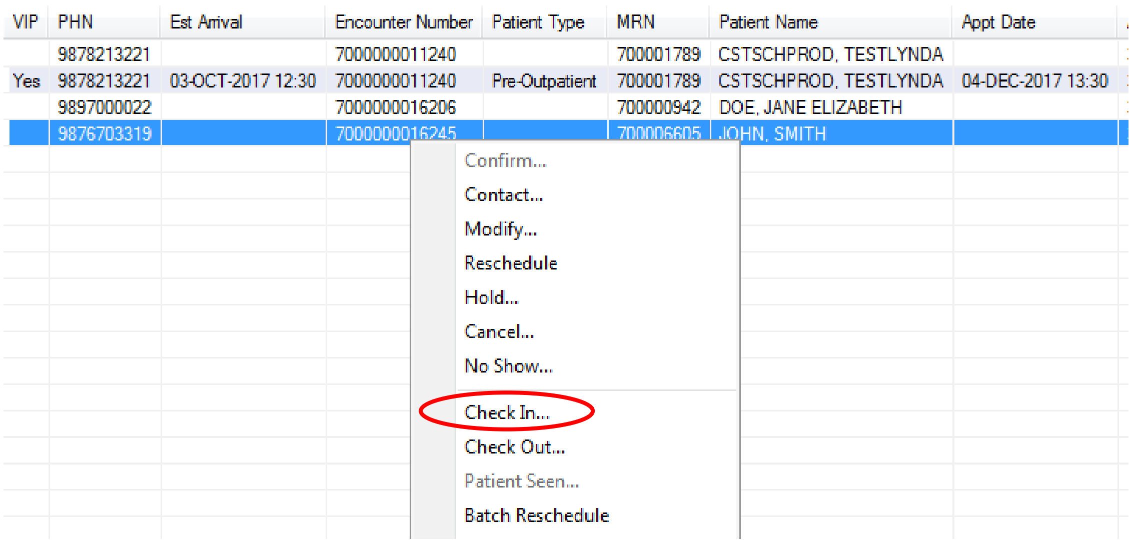
    Start time: add a start time, if appropriate

    End date: add a valid end date

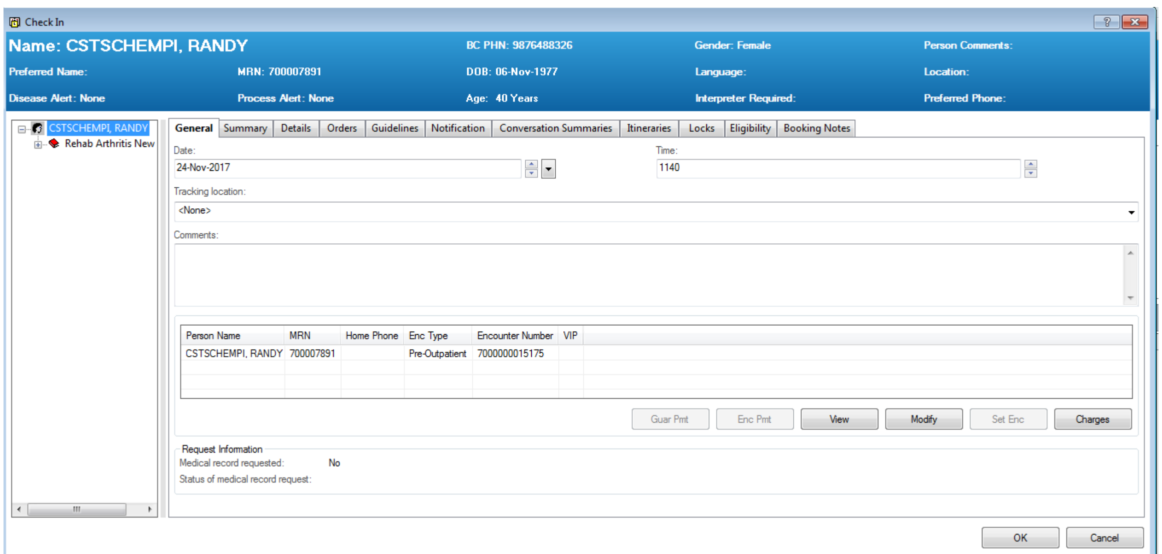
    End time: add an end time, if appropriate

    Location type: Ambulatory

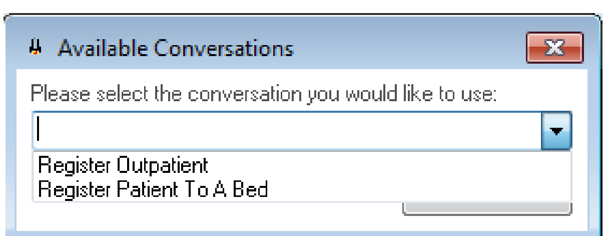
    Location: select from the drop-down list
3. Once you have found the appointment you would like to check in, highlight that appointment, right-click and choose **Check In**.



4. The “Check In” window will display.



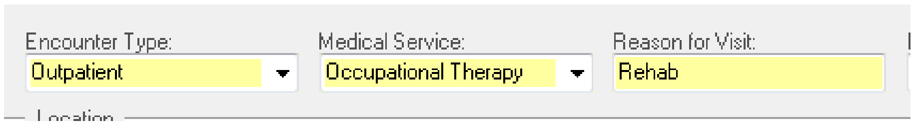
5. Press the **OK** button select an option from “Available Conversations” window.



6. Select “Register Outpatient” from the drop-down list and click **OK**.
7. The EMPI window briefly launches and opens the Register Outpatient Conversation window.
8. All the available mandatory fields will display in yellow. In order to Check-In a patient for an appointment, a full registration of the patient information is needed.

NOTE: If a patient checks in at the Central Registration prior to arriving at the clinic, these mandatory fields will already be filled.

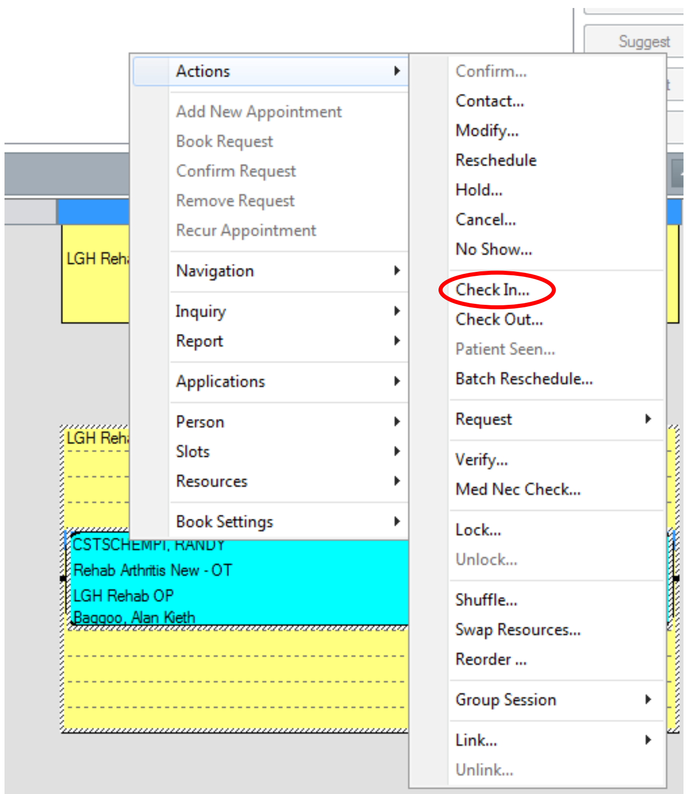
9. In the **Encounter Information** tab select "Outpatient" for Encounter Type and complete the rest of the mandatory fields.



10. Click on **Complete** button. The appointment is now in a Checked In status.

Option 2: Right click on the appointment within the scheduling grid area

1. You may also Check In appointments directly within the grid area. To accomplish this, right-click, go to **Actions**, then **Check In**.
2. The "Check In" window will display and the same steps as above are followed.



Option 3: Click on the Check-In icon on the Toolbar

1. You can also highlight the appointment in the grid area, and then click the **Check-in** icon  at the top of your screen.

2. The Check In window will display and you will follow the same steps as in the above methods of Check In.

The Outpatient Encounter Types will be automatically discharged (auto-discharged) by the system. The auto-discharge will occur one day after the registration date, and will be backdated to 23:59 on the registration date.

Appointment Link

Appointment link functionality allows you to manually tie two unrelated appointments together for a particular patient situation. As with the Recurring appointments, the system will recognize these appointments are linked and warn the user if any action is performed on one of the linked appointments.

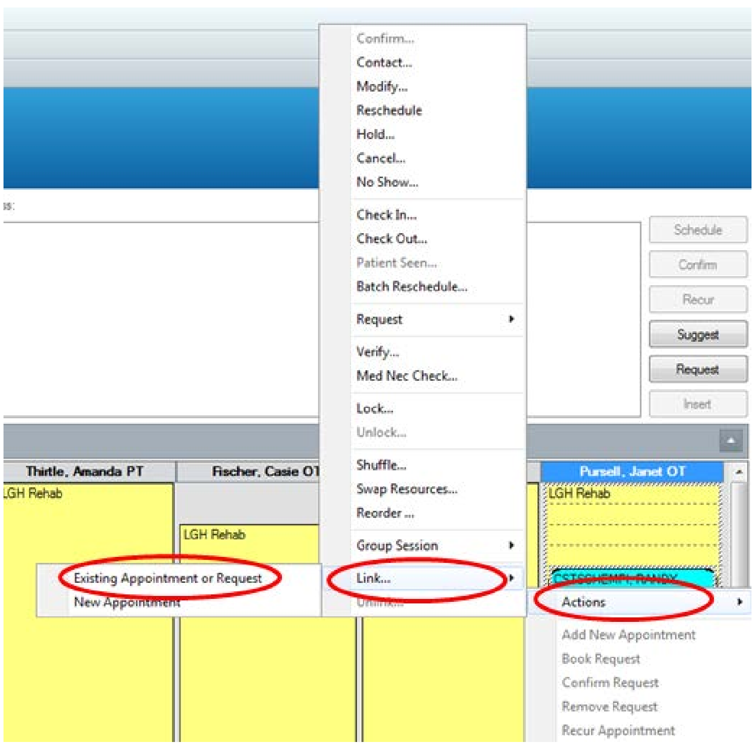
You have two options for linking appointments:

Option 1: Link to an existing (previously confirmed) appointment

Option 2: Link to a new appointment

Option 1: Link to an existing (previously confirmed) appointment

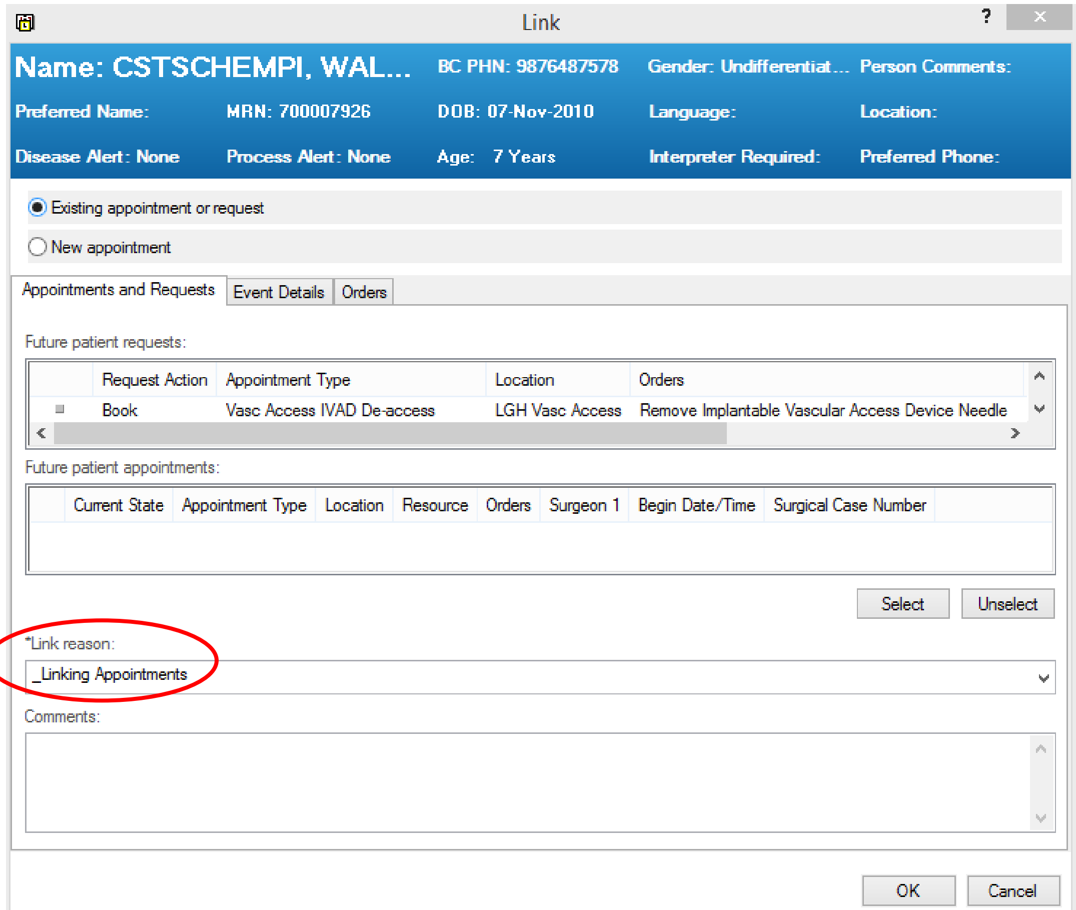
1. Schedule two different appointments for any patient using one of the previously described methods.
2. Find one appointment which you have just scheduled, highlight, right click, go to **Actions**, and then **Link**. At this point, you will see the two options for linking appointments.
3. Choose **Existing Appointment or Request**.



4. The "Link" window will display. You will notice the Future Patient Appointments section. This section should list the other appointment that you scheduled for this

patient. Highlight this appointment and press the **Select** button. A red checkmark will display.

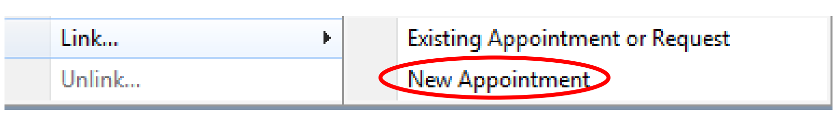
5. In the Link Reason dropdown, select "_Linking Appointments" and press the **OK** button.



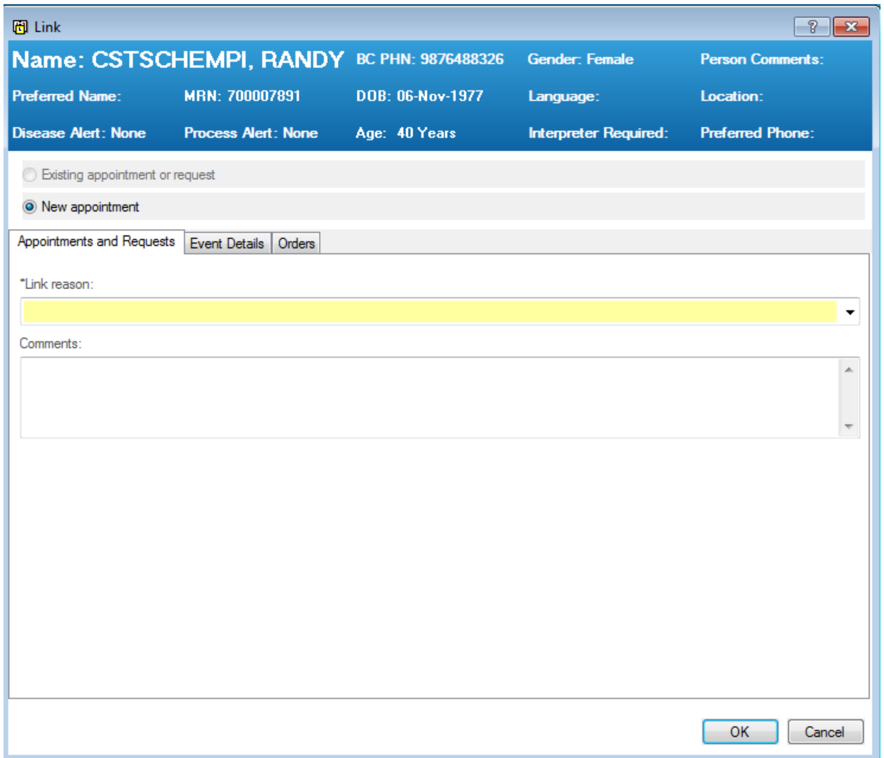
6. The two appointments are now linked.

Option 2: Link to a new appointment

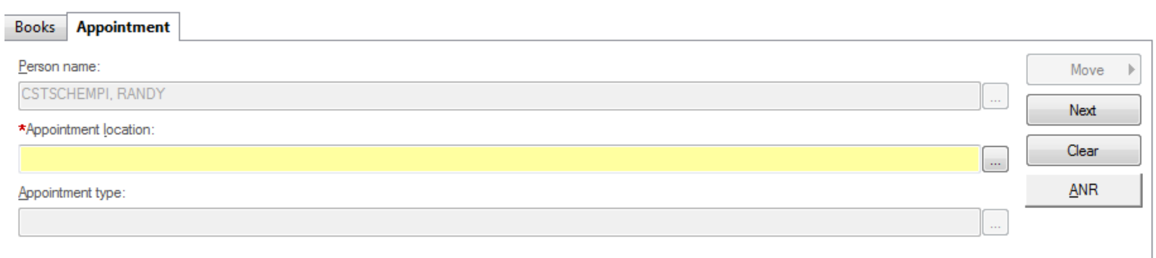
1. Highlight the first appointment again, right click, choose **Action** and then click **Link**. This time select **New Appointment**.



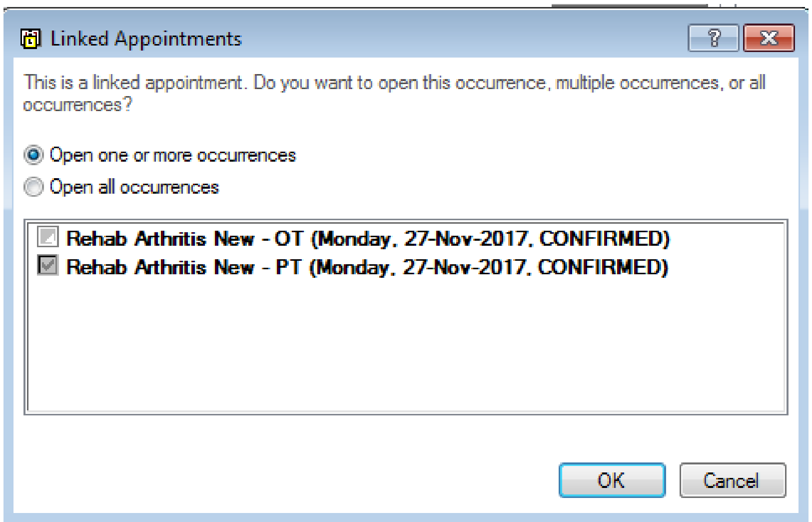
2. The "Link" window will display. In the Link Reason dropdown, select one of the options and press the OK button.



3. You will be brought back to the Appointment tab to select a new appointment type. The Person name is already defaulted with your patient's name. Select an **Appointment Type**, **Appointment Location** and fill out the remaining fields in the "Accept Format Fields."
4. Press the **MOVE** button and finish scheduling the appointment same as any other appointment.



5. The appointments are now linked.
6. If you perform an action on any of the linked appointment types, you will receive a warning.



7. This warning serves as a reminder that the appointment you are performing an action on is linked to other appointments. You can choose to perform the action only on your currently selected appointment, or to perform the action on all the linked appointments.